

Documentation

OTRS Business Solution™ 5 Manual

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OTRS Business Solution™ 5 Manual

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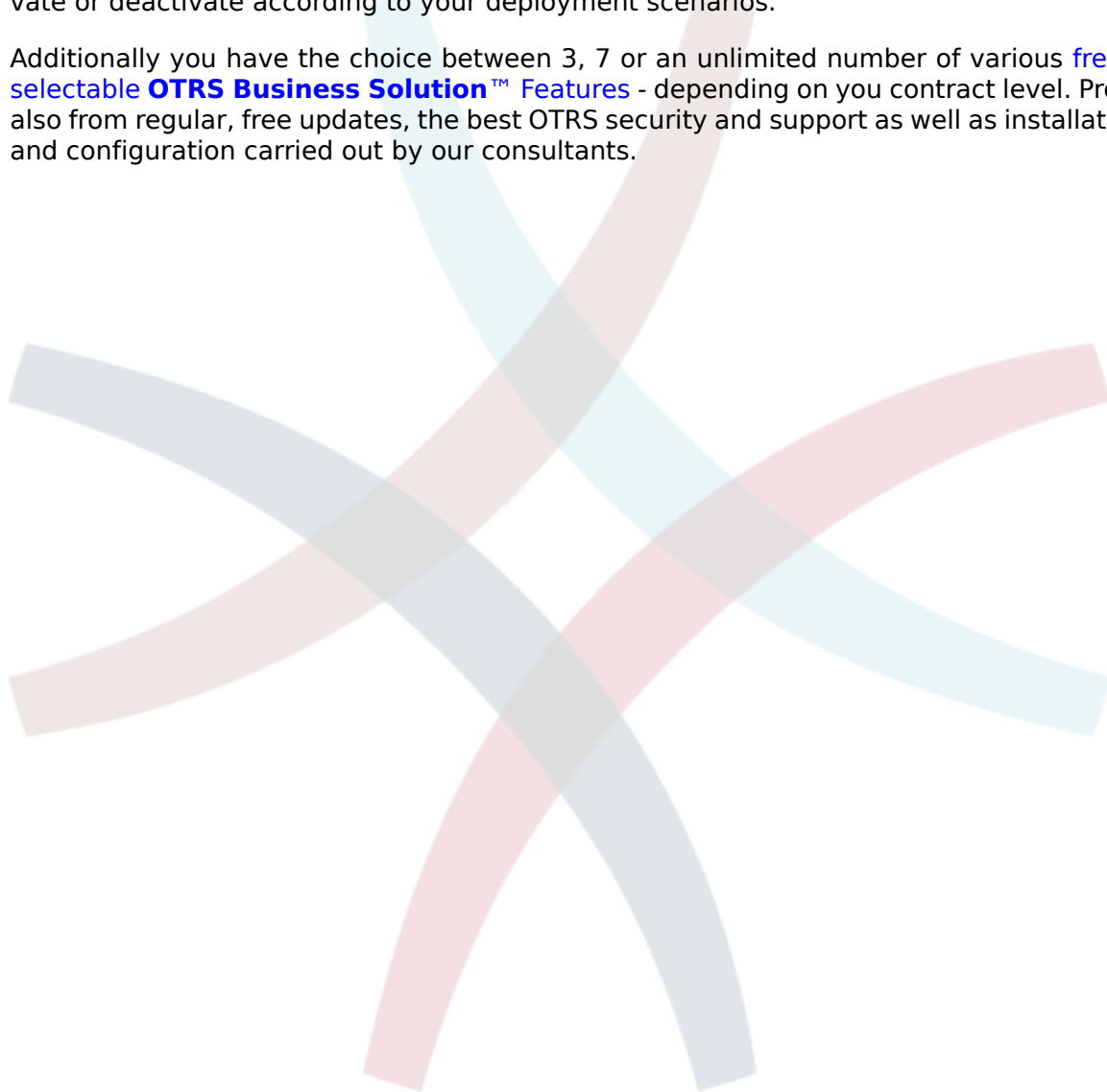


Chapter 1. Introduction

With the **OTRS Business Solution™** you can enjoy all benefits of professional services and exclusive Business Features offered by the OTRS Group. Optimize your internal & external communication for more service quality – flexibly adjustable to your operating scenario.

The sleek and fast framework of OTRS 5 is the base for the **OTRS Business Solution™**. On top are available for you additionally an exclusive set of features. These include the **integrated Cloud Services** of the **OTRS Business Solution™** that you can flexibly activate or deactivate according to your deployment scenarios.

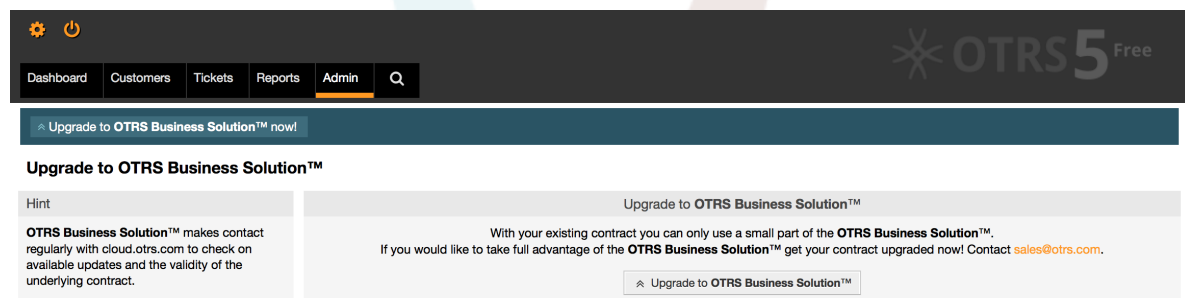
Additionally you have the choice between 3, 7 or an unlimited number of various **freely selectable OTRS Business Solution™ Features** - depending on you contract level. Profit also from regular, free updates, the best OTRS security and support as well as installation and configuration carried out by our consultants.



Chapter 2. Upgrading to OTRS Business Solution™

In order to upgrade to **OTRS Business Solution™**, you need a valid contract with the OTRS group. If you already have a contract, you can upgrade to **OTRS Business Solution™** by visiting the **OTRS Business Solution™** administration screen in your OTRS instance. You can find the link to this screen in the "System Administration" section of the admin area of your OTRS Free instance. Please note that you first have to register your system using the system registration mechanism.

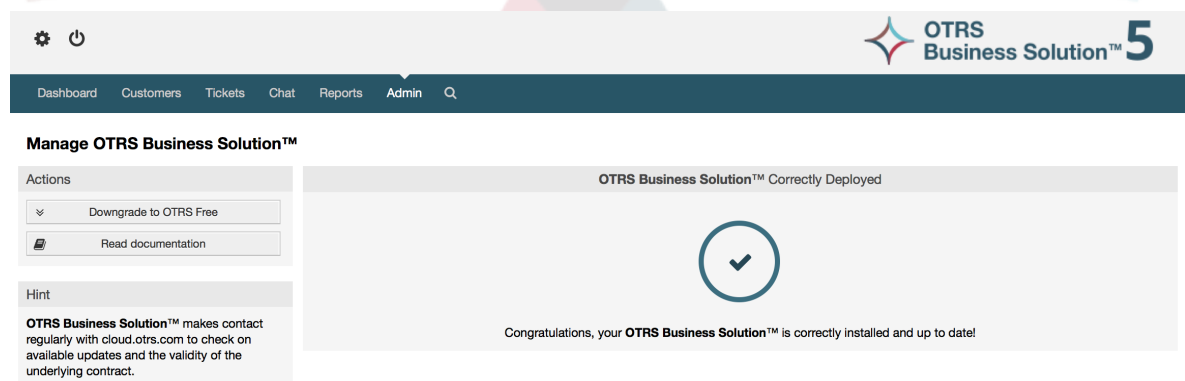
Figure 2.1. Upgrading Screen



If you're entitled to upgrade, you will (as an admin user) also see a notification bar which guides you to the upgrade screen. The upgrade itself is done automatically by just pressing the upgrade button. Please note that you don't need to confirm the upgrade again. Pressing the upgrade button immediately starts the upgrading process.

If the upgrade was successful, you will see a confirmation on the **OTRS Business Solution™** administration screen.

Figure 2.2. Upgrade Successful



If you have any questions regarding your entitlement for the **OTRS Business Solution™** or technical questions, please contact sales@otrs.com.

Chapter 3. Features of OTRS Business Solution™

1. The Chat

1.1. Description

The chat feature of **OTRS Business Solution™** allows for chats between agents and customers using the OTRS frontend. Once enabled, customers (or public users) can start chats with agents and vice versa. Finished chats can be archived and attached to tickets, or can be downloaded as PDF by agents, customers and public users.

Each chat is assigned to a chat channel. Chat channels are like chat rooms. Each chat channel is assigned to a certain group which controls the permissions for this channel. If no chat channel is selected when a chat is created, this chat will be created in a default channel (which is automatically created if it doesn't exist).

1.2. Configuration

The following SysConfig configuration options are relevant for this feature. Please note that you can also define a list of fixed texts which are being displayed to public users and customers in the chat module. For more information on which texts can be changed, please have a look at the module configuration (OTRSBusiness → Core::Chat).

ChatEngine::Active

Controls whether or not the chat feature is enabled.

ChatEngine::ChatDirection::PublicToAgent

Controls whether or not public users should be able to start chats (please note that the frontend module configuration for the public chat frontend in `PublicFrontend::Module###PublicChat` has to be enabled, too).

ChatEngine::ChatDirection::CustomerToAgent

Controls whether or not customers should be able to start chats (please note that the frontend module configuration for the customer chat frontend in `CustomerFrontend::Module###CustomerChat` has to be enabled, too).

ChatEngine::ChatDirection::AgentToCustomer

Controls whether or not agents should be able to start chats with customers directly.

ChatEngine::ChatDirection::AgentToAgent

Controls whether or not agents should be able chat with each other.

ChatEngine::PermissionGroup::ChatReceivingAgents, ChatEngine::PermissionGroup::ChatNotificationAgents, ChatEngine::PermissionGroup::ChatStartingAgents

Defines groups for the certain features. Receiving: Groups which can receive and accept chat requests. Notification: Groups which can receive notifications about new/pending chat requests. Starting: Groups which are allowed to start new chats at all.

ChatEngine::DefaultAgentName

A default name which should be displayed to customers and public users instead of the real name of the chatting agents. If empty or disabled, the real agent name will be shown.

ChatEngine::DefaultAgentNameNumbers

Controls whether or not numbers should be added to the agents default name in case more than one agent is in a chat to allow customers/public users to distinguish between the different agents (e.g. "Support Agent 1", "Support Agent 2" etc.).

ChatEngine::PublicInterface::AllowChatChannels

Defines, if chat channel selection should be enabled for public users. If set to "no", chats from public users will go to the default channel automatically (ChatEngine::DefaultChatChannel).

ChatEngine::PublicInterface::AvailabilityCheck

Defines, if chat channels should only be selectable in the public interface if at least one agent with sufficient permissions is available in this channel.

ChatEngine::CustomerInterface::AllowChatChannels

Defines, if chat channel selection should be enabled for customer users. If set to "no", chats from customer users will go to the default channel automatically (ChatEngine::DefaultChatChannel).

ChatEngine::CustomerInterface::AvailabilityCheck

Defines, if chat channels should only be selectable in the customer interface if at least one agent with sufficient permissions is available in this channel.

ChatEngine::CustomerThreshold

Amount of minutes which need to pass before a "no agent is available" message is being displayed to the customer/public user who started the chat request. The message can be configured using ChatEngine::Texts::CustomerFrontend::NoAgentsAvailable::NewTicket or ChatEngine::Texts::CustomerFrontend::NoAgentsAvailable::AddToExisting (customer interface) and ChatEngine::Texts::PublicFrontend::NoAgentsAvailable (public interface).

ChatEngine::AgentOnlineThreshold

If an agent is not active in OTRS within this threshold, they will be automatically set to "unavailable for chat" (see "Agents: Set up availability").

ChatEngine::DefaultChatChannel

Name of the default chat channel. This channel must not be created manually and can't be deleted. This channel is taken as target chat channel in case chat channel selection is disabled for any interface.

ChatEngine::ChatTTL

After how many hours a closed chat should be deleted from the database. Closed chats can still be viewed and downloaded by customers. After a chat has been deleted from the database, it will no longer be possible for customers to view or download it.

ChatEngine::ChatDecayTime

After how many days chats which are not closed should be deleted from the database automatically in order to keep the database clean. Please note that this setting can possibly delete chats which are still in use if they are older than the configured amount of days.

ChatEngine::ChatOrder

Defines, if new chats should be prepended or appended to the list of active chats in the active chats widget in the chat manager.

1.3. Setup

In order to be able to create your first chat, you need to setup certain things in your OTRS instance.

1.3.1. Admin: Create chat channels and assign permissions

In the admin area in OTRS, you'll find a new entry "Chat Channel" (AdminChatChannel). Use this screen to add new channels. You'll need to assign an existing agent group to each channel you'll create. You can use the screens "Agents <-> Groups" or "Agents <-> Roles" to assign permissions. There are new chat-specific permissions which are described below.

Available Chat Permissions

CHAT_OBSERVER

Users with this permission type will only be able to observe chats in this channel after they have been invited to them. They will not be able to accept or observe chats in this channel on their own and if they are the only agents currently available in this channel, customers/public users will not be able to create a new chat in this channel. Observers can still invite other agents to a chat they currently observe.

CHAT_PARTICIPANT

Users with this permission type will be able to take part in a chat, but only after they get invited to it. After they're in a chat, they can change the chat channel, discard the chat etc. They will not be able to accept a customer/public user chat request on their own.

CHAT_OWNER

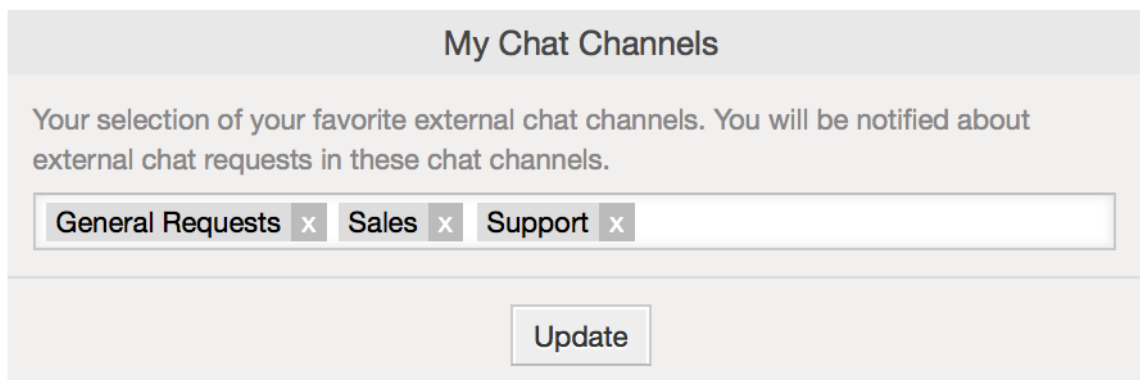
Users with this permission type will be able to accept chat customer/public requests and do all kinds of observer and participant actions on a chat.

Note

To use the chat in general, agents still need to have at least ro permissions to the groups set up in ChatEngine::PermissionGroup::ChatReceivingAgents and ChatEngine::PermissionGroup::ChatStartingAgents.

1.3.2. Agents: Select Active Chat Channels

Figure 3.1. Setting up preferred chat channels



My Chat Channels

Your selection of your favorite external chat channels. You will be notified about external chat requests in these chat channels.

General Requests x Sales x Support x

Update

As an agent, you'll need to select in which chat channels you want to be available. Customers will only be able to create a new chat request on a certain channel if at least one agent with owner permissions has selected this channel in their preferences and is set as available for external chats (see next section).

1.3.3. Agents: Set up Availability

Figure 3.2. Setting up Chat Availability



To be available for any chats, you'll need to use the chat toolbar switch. It's a three-way switch with these states: unavailable for chats (empty circle), available for internal (agent-to-agent) chats (empty circle with tick sign), available for internal and external (customer-to-agent, public-to-agent) chats (filled circle with tick sign). Just click the toggle in order to change your availability.

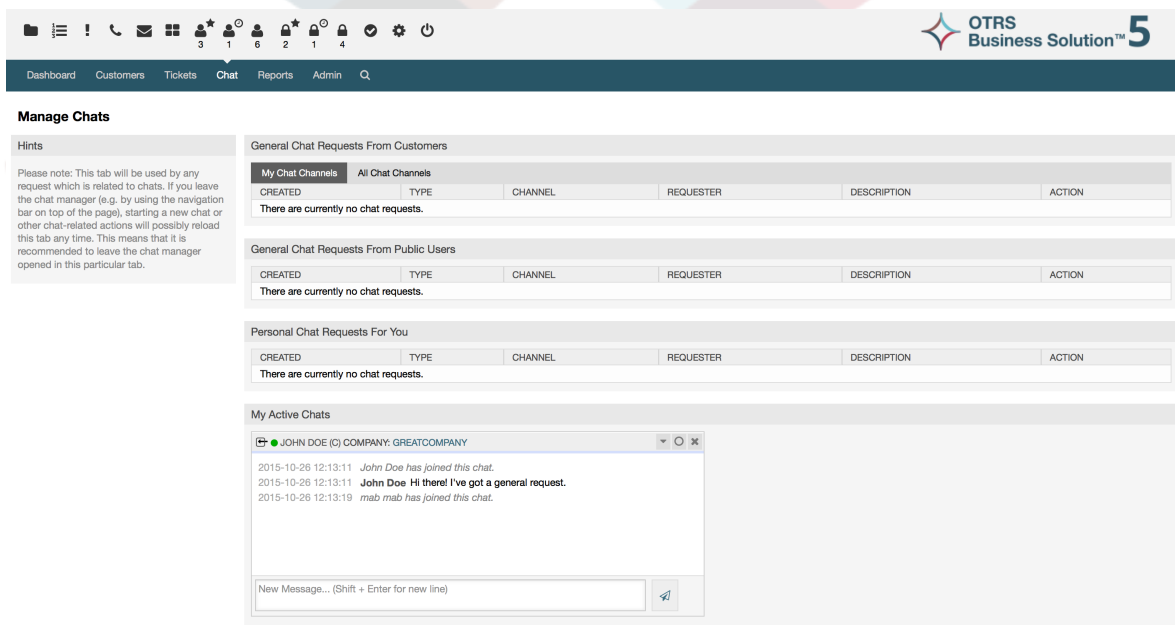
Note

Your availability will be reset to "internal chats only" each time you log in to OTRS again.

1.4. General Usage

1.4.1. The Chat Manager

Figure 3.3. The Chat Managing Screen



The chat manager is the central point of the chat feature. As an agent, here you can manage your chats and see and accept open requests. The chat manager provides a list of chat requests from customers, public users and other agents, as well as an overview over all active chats. Open the chat manager by using "Chat" in the main navigation of OTRS.

1.4.2. Starting New Chats

- *Agent to agent*

To start a chat with another agent, you can use the user online widget from the dashboard. Agents who are able to use the chat, will have a chat icon next to their name which you can click on. Once clicked, a chat form will open which you can use to enter your first chat message to this agent. After the chat request has been sent to the other agent, you can watch the chat in the chat manager.

- *Agent to customer*

To start a chat with a customer, you can use the customer user widget from the customer information center when viewing a certain customer. Online customers will have a chat icon next to their name which you can click on. Once clicked, a chat form will open which you can use to enter your first chat message to this customer user. After the chat request has been sent to the customer, you can watch the chat in the chat manager.

Another possibility is to create a chat from the ticket zoom. If the customer user who is selected in this ticket is currently online, you'll be able to use a chat icon next to their username in the customer information box in right sidebar (see figure below).

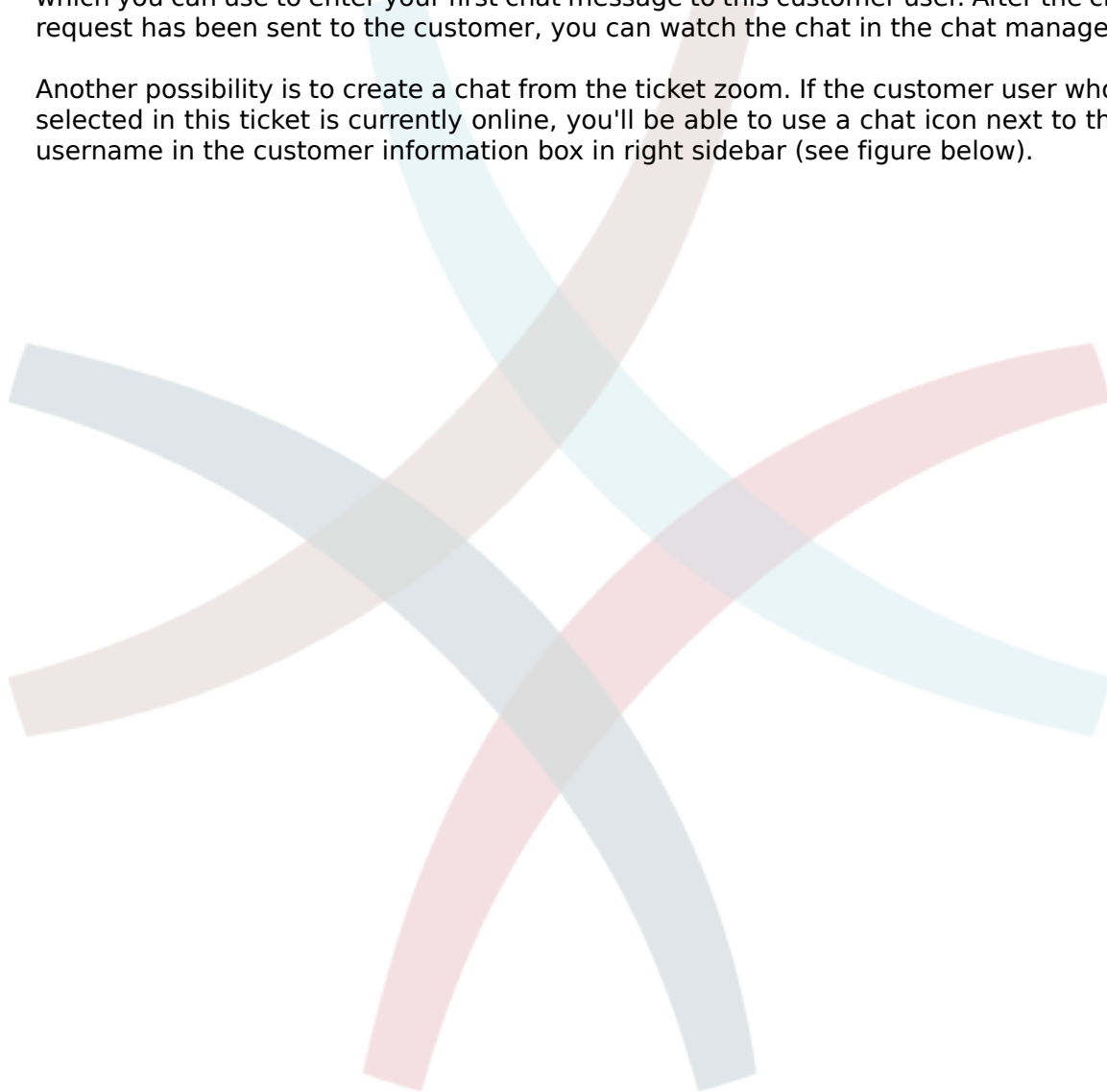






Figure 3.4. Starting an A2C chat from ticket zoom

▼ Customer Information

Firstname: John


Lastname: Doe


Username:  mab_kunde2


  


Email: mab_kunde2@localhost


Customer: GreatCompany


 [Open tickets \(customer\) \(3\)](#)


 [Open tickets \(3\)](#)

 [Closed tickets \(0\)](#)

 [Closed tickets \(0\)](#)

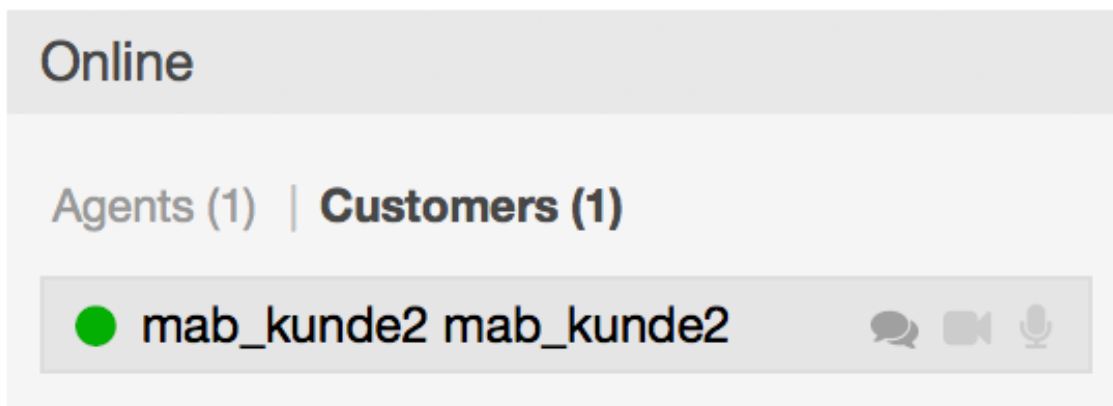
 [Google](#)

 [LinkedIn](#)

 [XING](#)

Additionally, you will be able to start chat with customer users by clicking on chat icons next to their name in the user online widget on the dashboard.

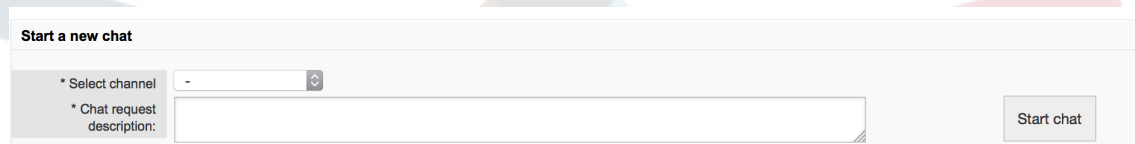
Figure 3.5. Starting an A2C chat from dashboard



- *Customer to agent*

Customers are not able to start a chat directly with a certain agent, but only to create generic chat requests. To do this, customers can use the item Chats → Create new chat from the customer interface main navigation.

Figure 3.6. Starting a C2A chat



- *Public to agent*

Users of the public interface are also not able to start a chat directly with a certain agent, but only to create generic chat requests using the public chat module (public.pl?Action=PublicChat). If you would like to integrate the public chat module into your website, you can use the IsIframe parameter. The OTRS header and footer will then be removed from the view (public.pl?Action=PublicChat;IsIframe=1).

1.4.3. Handling Chat Requests

If there is a new chat request in one of the channels you (as an agent) have permissions for, you'll receive a browser notification which allows you to go directly to the chat manager. After you've opened the chat manager, you can see a list of open requests of all types (see figure below).

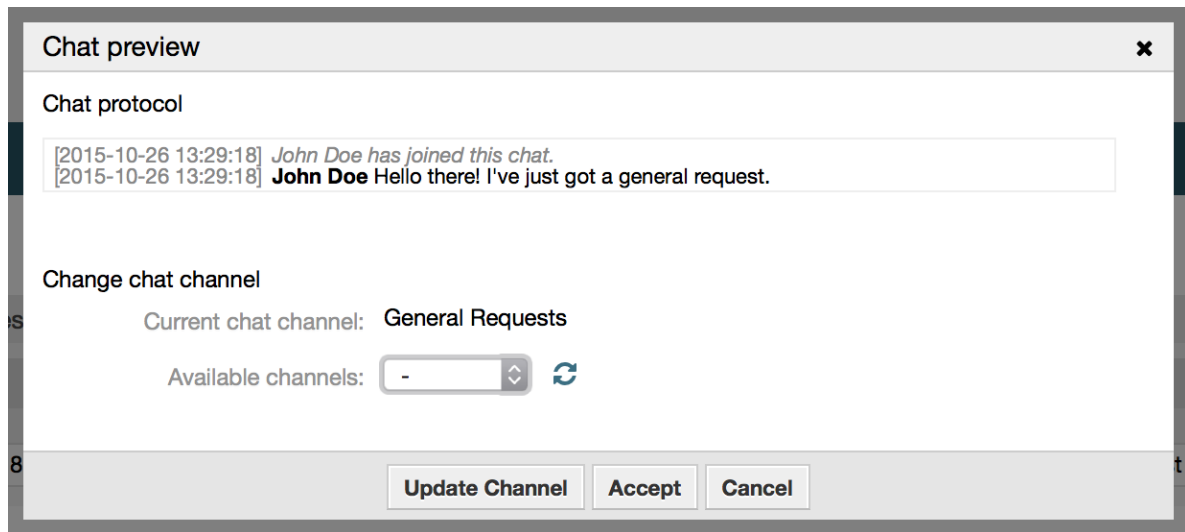
Figure 3.7. An Open Chat Request

General Chat Requests From Customers					
My Chat Channels		All Chat Channels			
CREATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION
2015-10-26 13:29:18	Customer	General Requests	John Doe	Hello there! I've just got a general request.	Open chat

Use the "open chat" button from the list to see the details of the request. Clicking the button will open an overlay which provides several actions on this request. Given that you've got sufficient permissions, you can accept the request or change the channel for this request. Changing the channel will follow the same rules as creating new request: you can only move the request to a channel which has active agents in it.

Changing the chat channel without accepting the request could be used to dispatch chats to the right department for example.

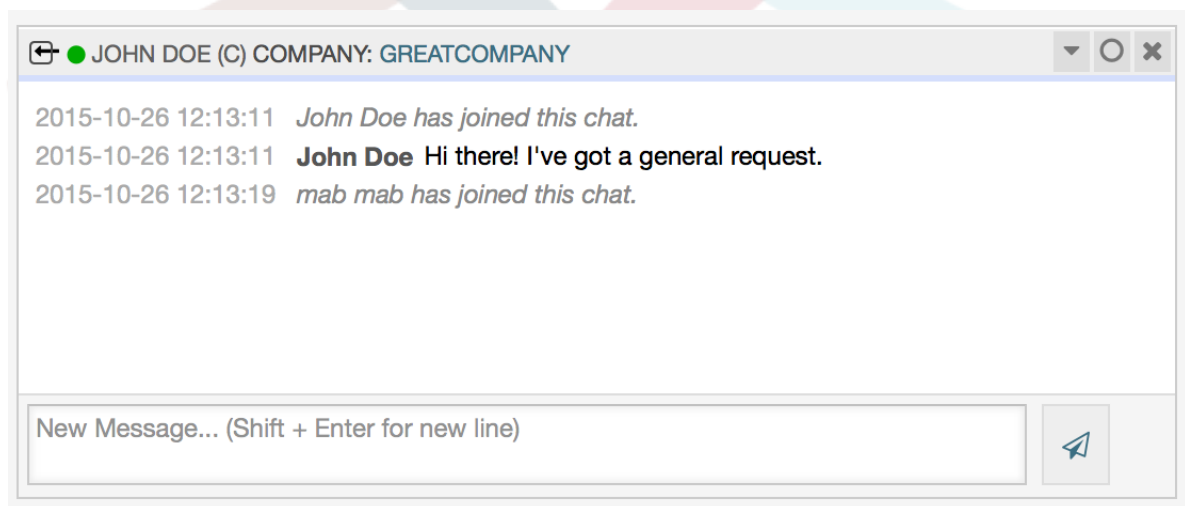
Figure 3.8. Open Chat Request Details



If you want to enter a chat, you can use the "Accept" button from the chat detail overlay box. The chat will then be removed from the list of requests, added to the list of your active chats and the customer/public user will receive a message that you've entered the chat.

1.4.4. The Chat Widget

Figure 3.9. The chat widget



The chat widget is the main component you'll use when chatting with other people. It provides a history of all messages in the chat as well as list of possible actions (depending on your permission level).

To send messages, you can use the text field in the chat widget in your list of active chats. Once you are done with typing your message, submit it by either clicking the send icon next to the text field, or using tab and enter (consecutively). When the message has been sent, the cursor will jump back to the text field to allow for easily continuing to type.

Following you'll find a list of possible actions in the chat widget.

- *Action: Monitor & close*

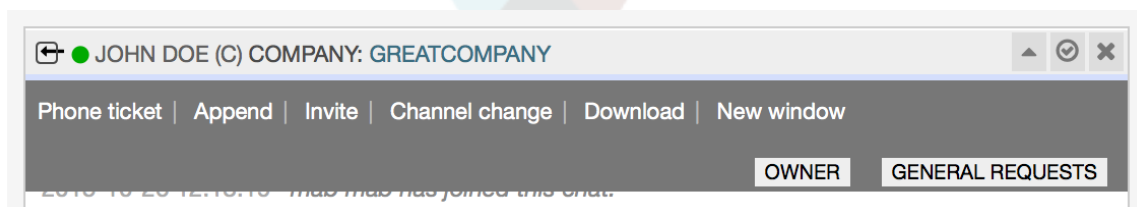
From the chat widget head top right hand side, you can close the chat by clicking the "x" icon. Clicking the circle icon right next to the close icon, allows you to set up a personal monitoring for this chat, which is again a three-way switch (no monitoring = empty circle, only monitor customer activity = empty circle with tick icon, monitor all actions = filled circle with tick icon). When monitoring a chat, browser notifications will show up each time there is a new action in this chat.

Also from the header, you can expand a toolbar of advanced chat actions for this chat using the triangle icon. The toolbar also shows you the channel this chat takes place in and which role you have in this chat (e.g. Owner).

Figure 3.10. Monitor a chat



Figure 3.11. Advanced chat actions



- *Action: Phone ticket*

Using the "Phone ticket" link from the advanced toolbar, allows you to create a phone ticket to which the current chat will be appended to as an article. After you've successfully created the ticket, the chat will get closed automatically.

- *Action: Append*

Allows you to append this chat as an article to a selected ticket. After the article has been created, the chat will get closed automatically.

- *Action: Invite*

Allows you to invite another agent to this chat. You can select from a list of available agents who you want to invite. Once you've invited the agent, a new agent-to-agent chat request will be sent to this agent. After the request has accepted, a new internal chat will be established between you and the invited agent. In this internal chat, the invited agent has two more actions available in the advanced actions toolbar: "Observer" and "Participant".

- *Action: Channel change*

Using this link, you can change the channel for this chat. For the selection of the target channel the same rules apply as for initially selecting a chat channel.

- *Action: Download*

Lets you download the complete history of this chat as PDF.

- *Action: New window*

Opens this chat in a separate popup window. You can use this window in the same way as the chat widget and both the widget and the popup can be used at the same time.

- *Action: Observer*

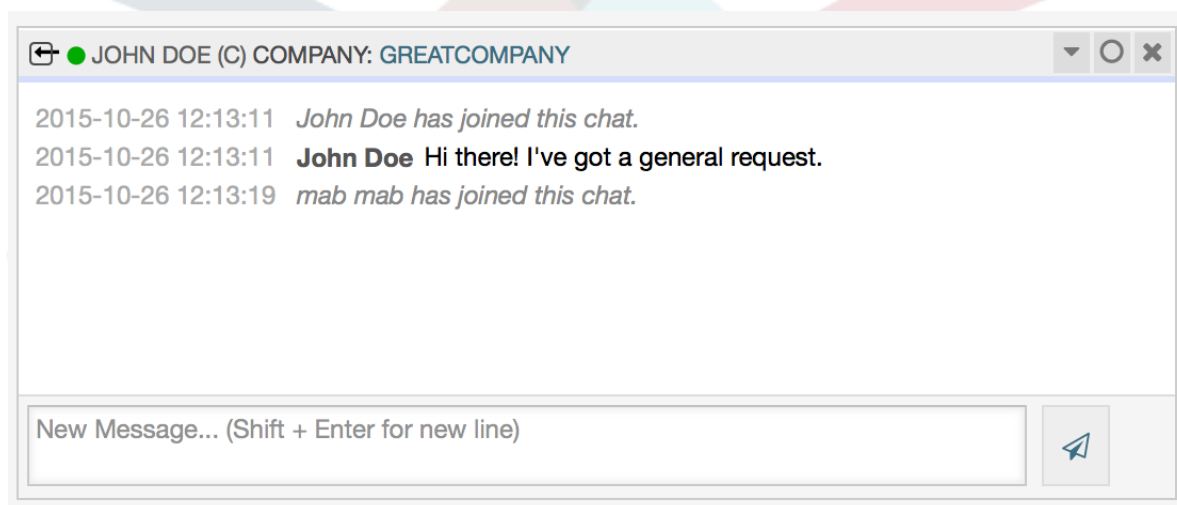
When you have been invited to a chat by another agent, you can decide if you want to join the chat as observer or participant (depending on your permission level). Once you click the action from your toolbar, a new chat widget will be added to the list of your active chats which is the chat you have been invited to. If you join the chat as observer, you will only be able to read what others are contributing to the chat and you will be invisible to customers or public users. Agents will still receive a message that you joined the chat as observer. As an observer, you have the possibility to become a participant anytime by using the advanced action toolbar in your chat widget (depending on your permission level).

- *Action: Participant*

If you want to contribute something to the chat you have been invited to, you can join it as a participant. Customers/public users and agents will receive a message that you have entered the chat. As a participant, you can become an observer anytime by using the advanced action toolbar in your chat widget.

1.4.5. User availability

Figure 3.12. The chat widget



Every chat participant has colored icon(circle) before his/her name in the *Chat widget* header, which represents participant availability. Icon color represents participant state as follows:

- *Active* - participant is active(available and online).
- *Away* - participant is away (available, but there was no request sent to the server from this user for some time - default 5 minutes, see ChatEngine::AgentOnlineThreshold).
- *Inactive* - participant is inactive (chat request is not accepted yet or participant left the chat).
- *Unavailable* - participant is unavailable (set via *Availability* button).
- *Offline* - participant has logout or session has expired.

2. Video and Audio Calls

2.1. Description

The video and audio calls feature of the **OTRS Business Solution™** provides real-time calls between two users right from the comfort of the OTRS front-end. The calls will be provided over a direct peer-to-peer connection established between two users, where possible. This feature depends heavily on the chat, which must be active for video and audio calls to be possible.

Note

Video and audio calls are based on a quite young technology called WebRTC. The implementation of WebRTC APIs in modern browsers is an ongoing effort. Currently, OTRS video and audio calls are supported only in the latest versions of Mozilla Firefox and Google Chrome (for Chrome a HTTPS Enabled Web Server is required).

2.2. Configuration

The following SysConfig configuration options are relevant for this feature.

ChatEngine::Active

Controls whether or not the video and audio calling feature is enabled. Please note that the same switch will control the chat feature too.

ChatEngine::PermissionGroup::VideoChatAgents

Defines the group for the video and audio calling features. Only agents with permission in this group will be able to make video and audio calls.

2.3. Setup

In order to be able to start video and audio calls, you need to setup certain things in your OTRS instance.

2.3.1. Chat Setup

You need a working chat setup in your system. Make sure to carefully read the "Setup" section of the chat feature.

2.3.2. HTTPS Enabled Web Server

Currently, Google Chrome will allow access to a user's media streams only to web applications served over the HTTPS protocol (SSL) with valid signed certificates. Make sure you have set the **HttpType** config option to *https*, too. Setting up a web server to be accessible via HTTPS is outside of the scope of this manual.

2.3.3. Availability for calls

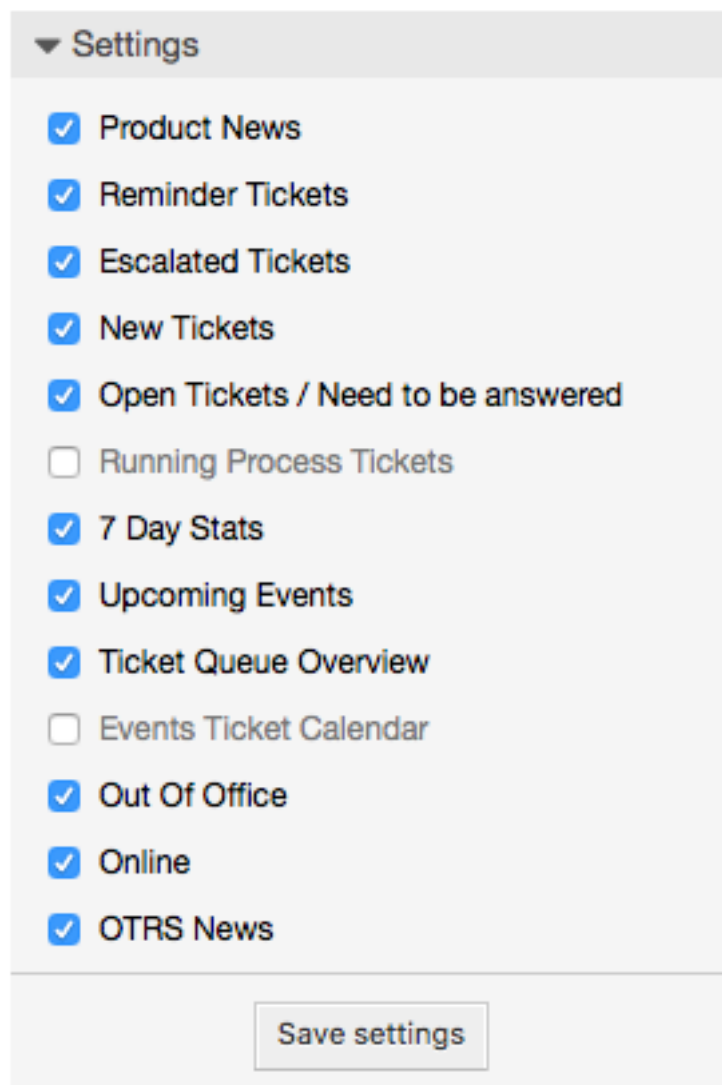
To be available for video and audio calls, you have to make sure you are available for chats too. Please refer to the instructions in "Agents: Set up Availability" for more information.

2.3.4. Online User Dashboard Widget

For a convenient way to start the calls, please activate the "Online" widget on the Dashboard.

1. Go to the Dashboard and expand the "Settings" widget.
2. Check the "Online" widget and make sure to click *Save settings*.

Figure 3.13. Setting up the Online widget on Dashboard



2.4. Usage

2.4.1. Chat Requirement

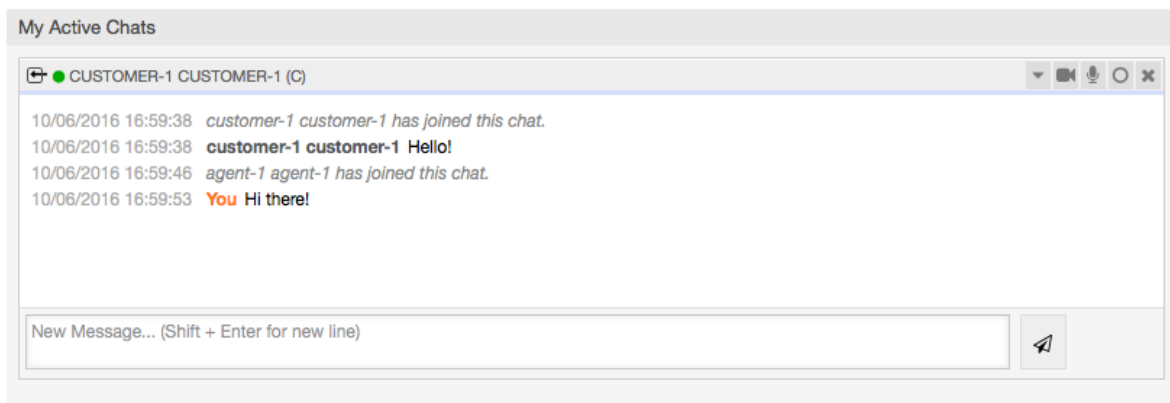
Video and audio calls are tied to existing chats. As an agent, you will be able to initiate calls inside and outside of chats. Customer users will be able to initiate calls only from an active chat.

If a chat does not yet exist, it will be created when the call is initiated. In these "ad-hoc" chats, the chat parties are joined automatically. When a call is terminated, these chats will remain active until they are closed manually.

2.4.2. Making the Video Calls

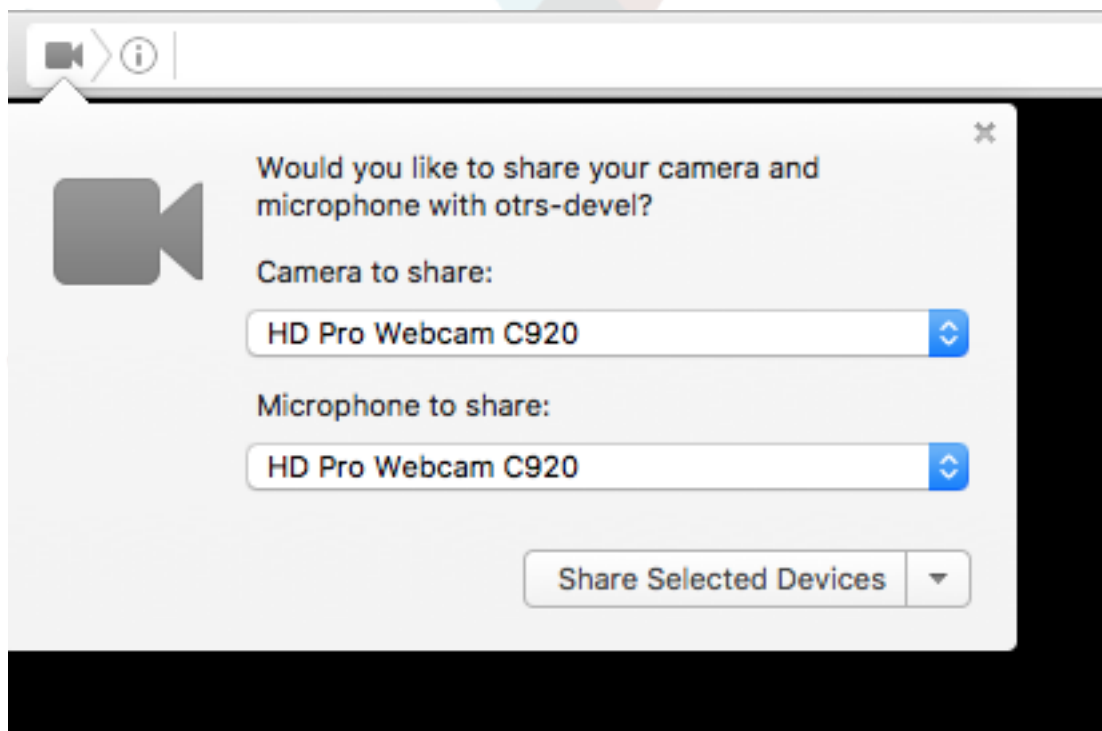
To make a call inside of an active chat, simply click on the small video camera button in the chat header.

Figure 3.14. Making a call inside the chat



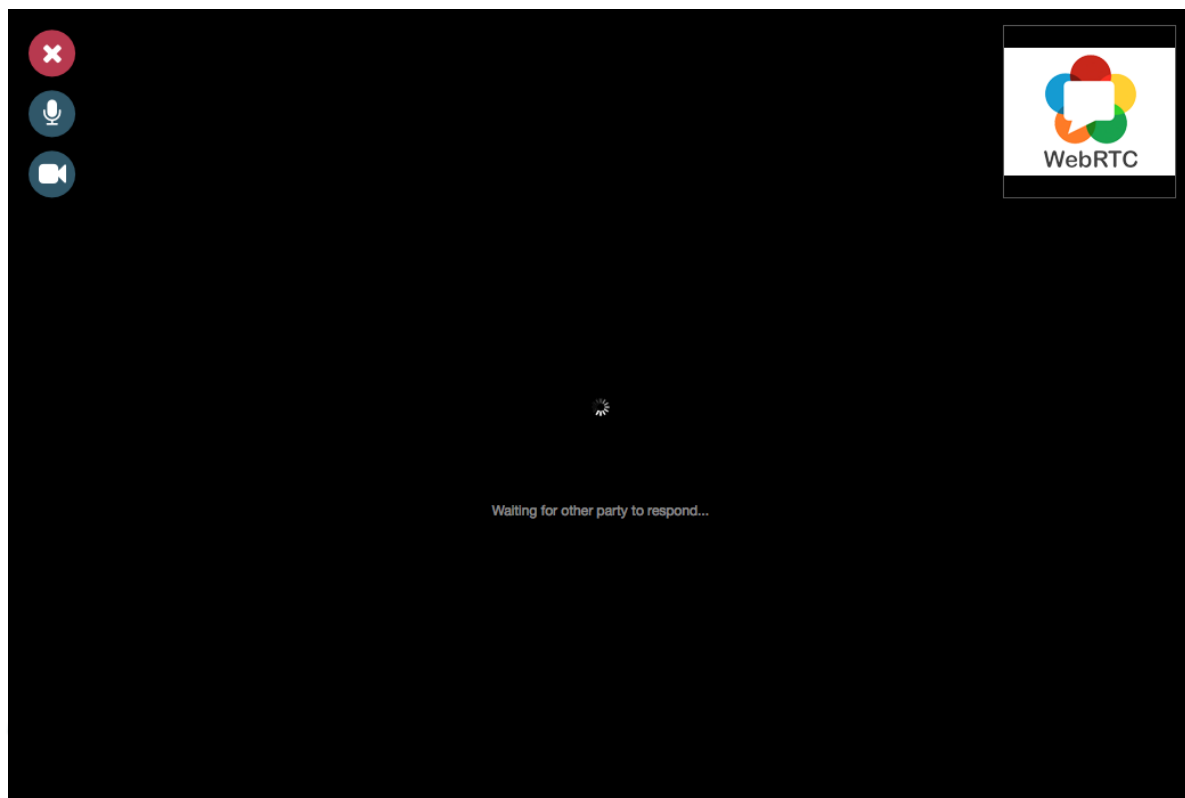
A popup window will open, and depending on your browser, you will be asked to share your video and audio streams. On systems with several cameras and microphones, you will be able to choose exactly the one you would like to use from the drop down list.

Figure 3.15. Media Permission Request



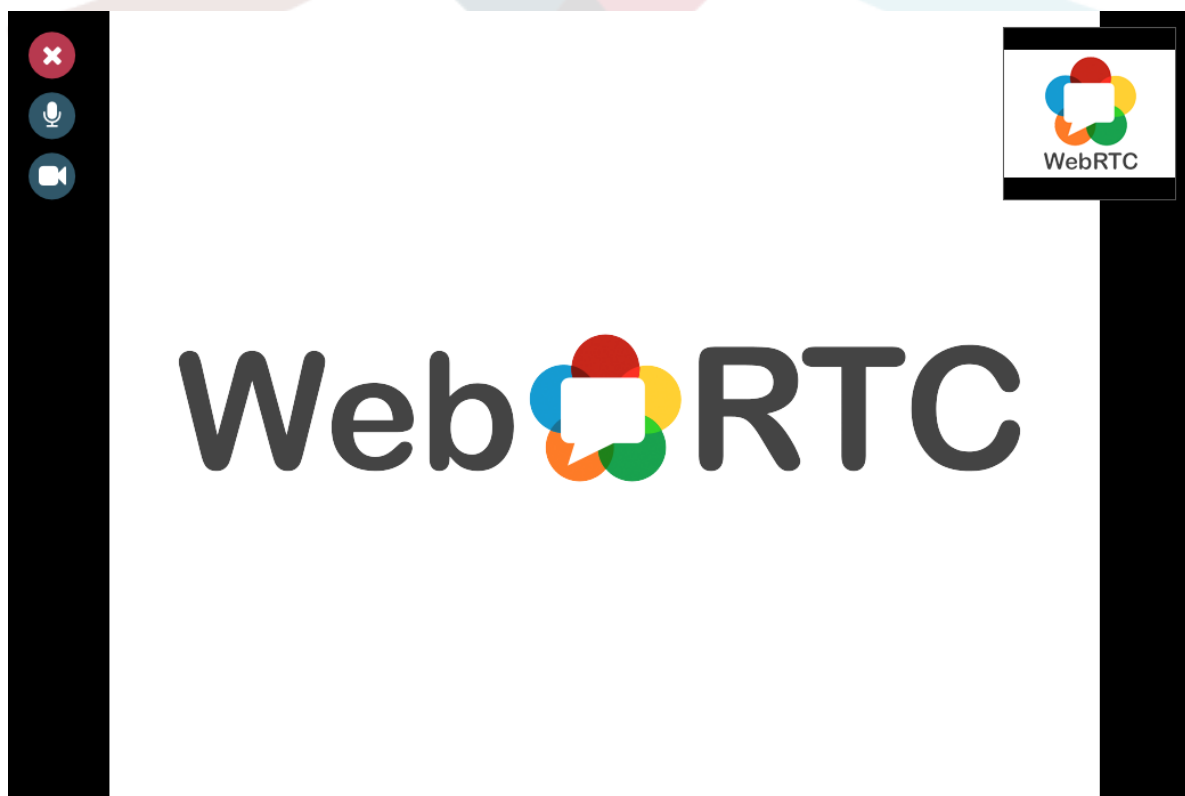
Once you confirm your choice, an invitation will be sent to the other party asking them to join. You will be notified of the progress via a message in the center of the screen.

Figure 3.16. Waiting for the other party



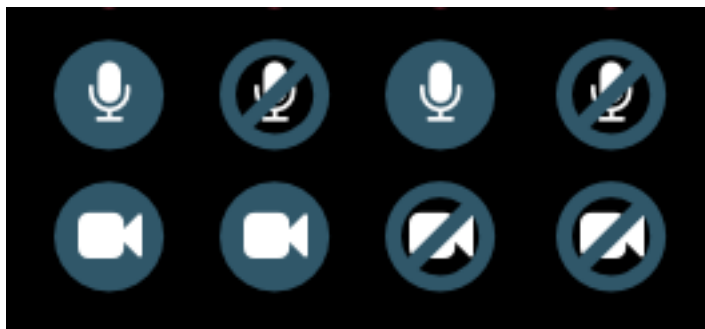
Please just wait a little while until the connection is established. Then you will be able to see and hear the other party.

Figure 3.17. Established Connection



To control your streams, simply toggle the mute buttons on the left side.

Figure 3.18. Mute Buttons



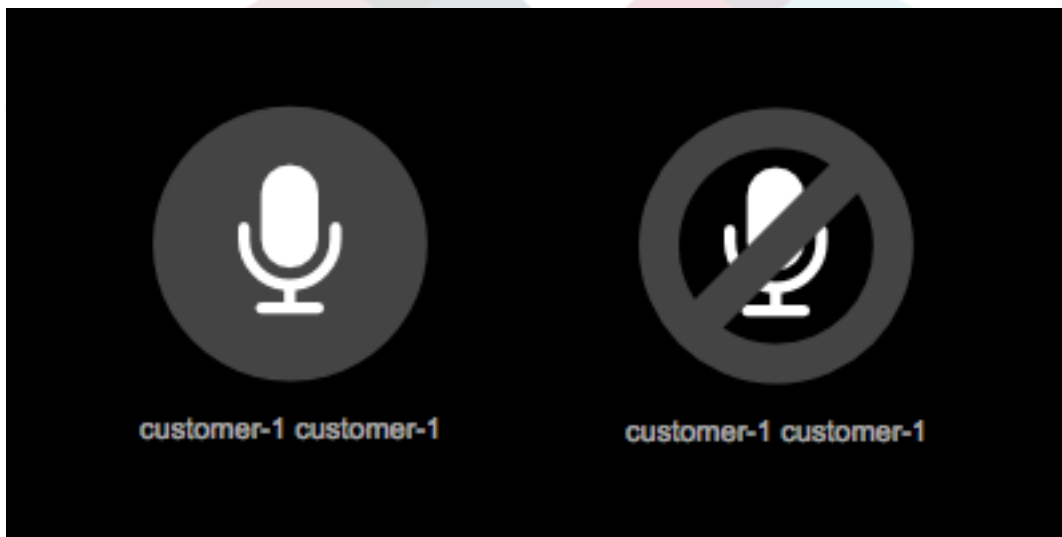
To leave a call, simply click on the big red "Close" button. The other party will be notified.

2.4.3. Audio Calls

The only difference between video and audio calls is that audio calls will mute your video stream initially (which you will be able to turn on later in the call). The video stream will be muted for both parties by default, but they will be able to control it.

If the other party has muted their video stream, instead of the video you will see a large microphone icon in the center, along with their name. The icon will reflect the state of their audio stream, and if they mute it too, it will be crossed out.

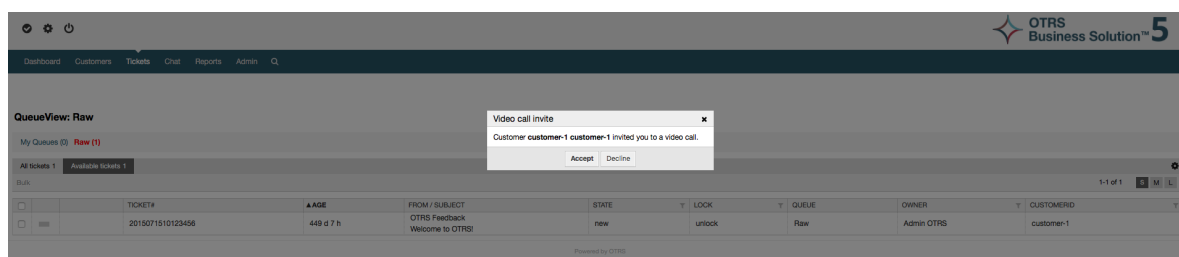
Figure 3.19. Audio Only



2.4.4. Call Invitations

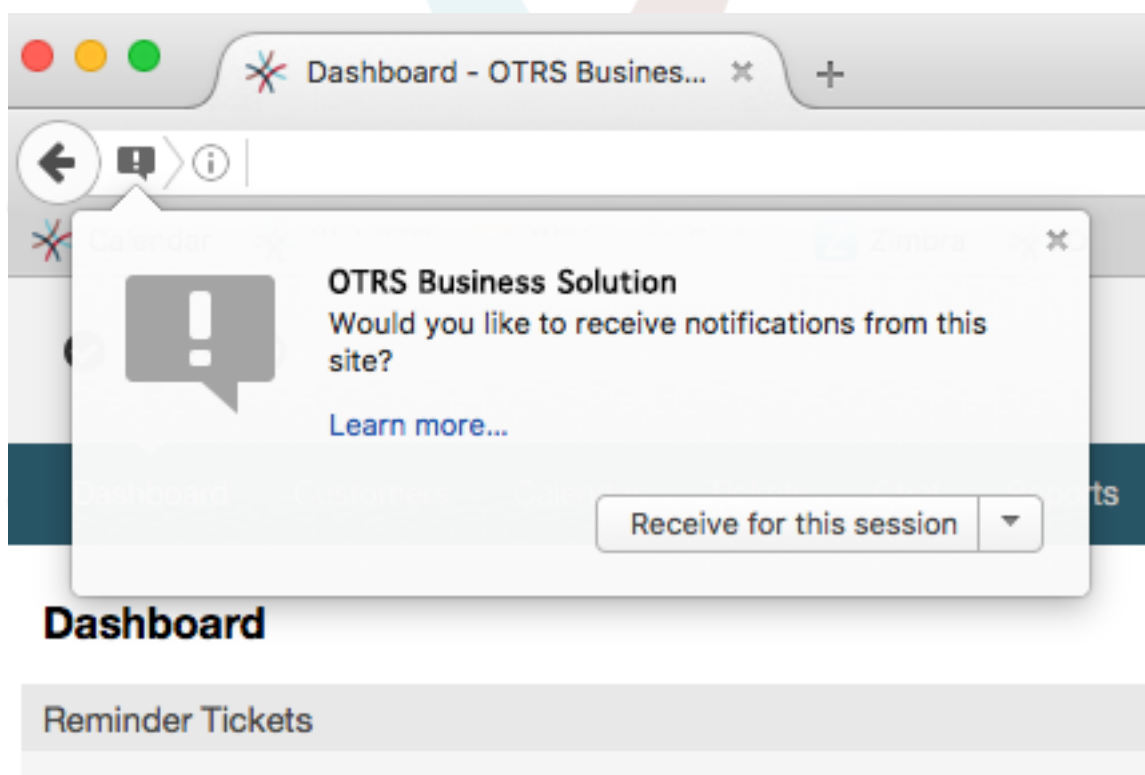
If you have made yourself available for chats (either internal or external), video and audio call invitations are received automatically by one of the active tabs in the same user session. When you receive an invitation, a modal dialog will be displayed on your screen, allowing you to accept or decline the invitation.

Figure 3.20. Call Invitation



Your browser may also present you a notification with sound. This heavily depends on the used browser and operating system settings, and if permission has been granted to OTRS to trigger such notifications. A permission request will be displayed the first time you change your chat availability.

Figure 3.21. Notification Permission Request

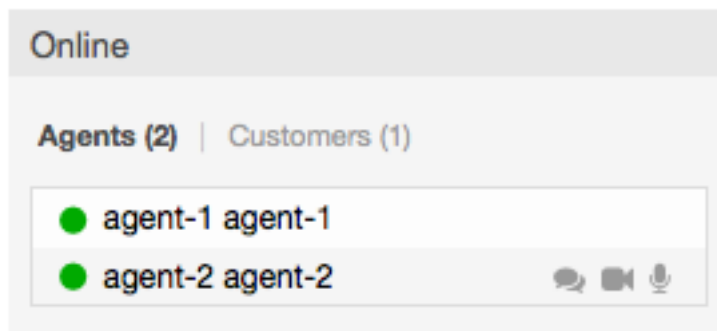


2.4.5. Other ways to start Video and Audio Calls

- *Agent to Agent*

To start a video or audio call with another agent, with whom you do not have an active chat, you can use the Online widget on the dashboard.

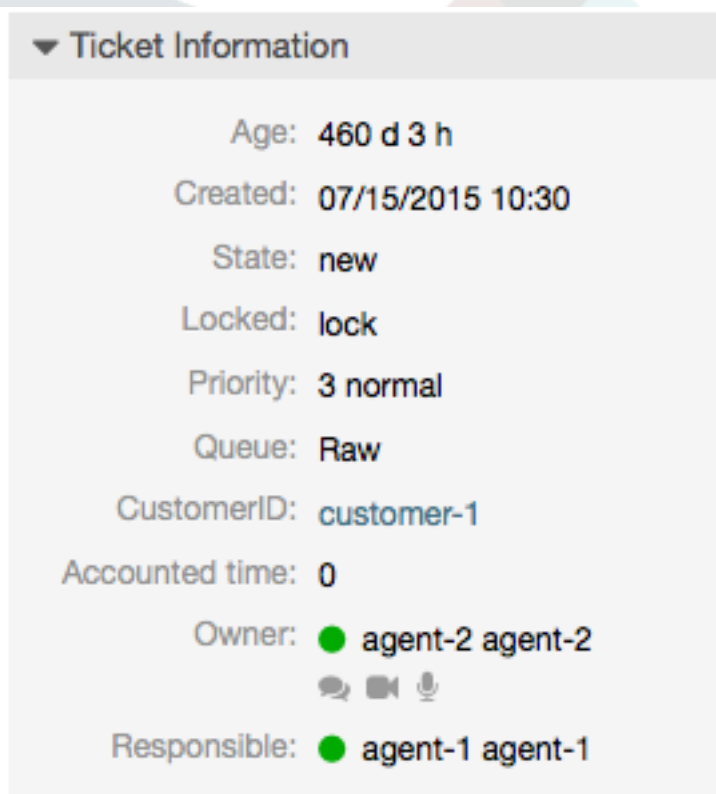
Figure 3.22. Online widget on the Dashboard



Agents who are able to receive calls will have a video camera and microphone icon next to their name which you can click on. Once clicked, a popup window will open, asking you to share your media streams. The connection will be established afterwards.

Calling other agents is possible also via Owner and Responsible fields in ticket zoom. In this case, check will also be done to make sure the other agent is available, before allowing the call to be initiated.

Figure 3.23. Calling other agents from Ticket Zoom



- *Agent to Customer*

To start a video or audio call with a customer, with whom you do not have an active chat, you can use the customer user widget in the Customer Information Center when viewing a certain customer. Available customers will have call icons next to their name which you can click on. Once clicked, a popup window will open asking you to share your media streams. The connection will be established afterwards.

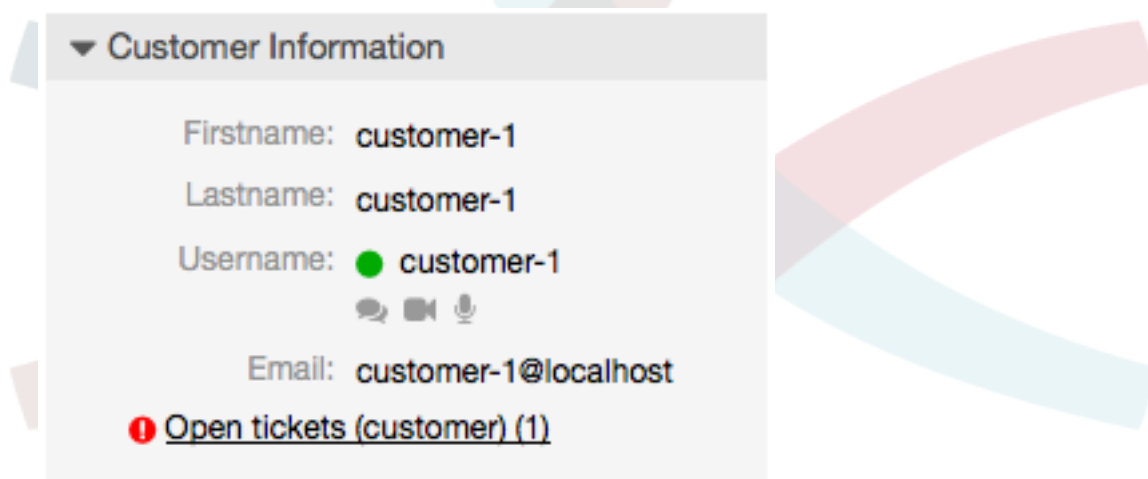
Figure 3.24. Making a call from Customer Information Center

Customer Information Center — customer-1



Another possibility is to make a call directly from the ticket zoom. If the customer user who is assigned to this ticket is currently online, you'll be able to use call buttons next to their username in customer information box in right sidebar.

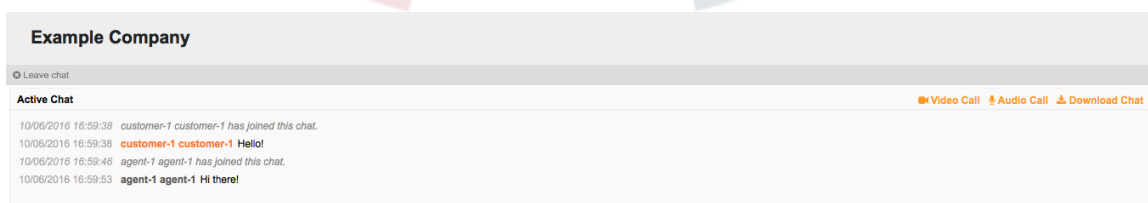
Figure 3.25. Making a call from Ticket Zoom



- *Customer to Agent*

Customer users will be able to initiate calls from an active chat only. To do this, customers can use the video and audio call links in the header of an active chat to initiate calls.

Figure 3.26. Starting a Video Call from Customer interface



When customers click on a link, they will be asked for permission to their media streams, similar to agents. An invitation will be sent and the connection will be established if the agent on the other side accepts the request.

The difference between video and audio calls in the customer interface compared to the agent interface is minimal. Customers will see their calls inside the same window as the chat. Only one additional button is provided: Fullscreen. It will resize the video to the extent of the browser window. Other than that, everything as in the agent interface applies.

- *Public to Agent*

Users of the public interface are not able to make audio and video calls.

2.5. Connection

In the best case scenario, video and audio calls will be streamed over a direct peer-to-peer connection between users' browsers. The requirement is that the user's network allows connection over a high port that WebRTC uses, and can advertise this to the other party. To this end, there are several mechanisms in place to aid in connecting.

- *STUN (Session Traversal Utilities for NAT)*

STUN (Session Traversal Utilities for NAT) is a standardized set of methods and a network protocol to allow an end host to discover its public IP address if it is located behind a NAT. OTRS provides a cloud service with STUN to all users of the **OTRS Business Solution™**, and this data is shared with the other party to allow the connection to be established.

In case of a connection via STUN, only the connection data is stored on the OTRS servers, the connection itself is still directly between two users.

- *TURN (Traversal Using Relays around NAT) over UDP*

TURN is a protocol that assists in traversal of network address translators or firewalls for multimedia applications. OTRS also provides TURN cloud service which can help clients on networks masqueraded by symmetric NAT devices and it supports the connection of a user behind a NAT.

In case of a connection established via TURN server, media streams will be routed through the server (like a proxy). In this situation, all packets are securely transmitted to the other side. The access to the TURN server is encrypted and secured by often changed credentials, which are provided automatically.

- *TURN over TCP*

In case all UDP traffic is blocked between two users, the TURN server over TCP is a last resort for a successful connection. While TCP is not an ideal protocol for transmitting media packets, it's a last resort in an effort to connect two users and share their streams.

Same as with TURN over UDP, media streams will be routed through the server and sent to the other side. The infrastructure for all STUN and TURN services is highly scalable based on demand and can even be provided for different geographic locations, in order to provide the best possible throughput.

3. The Dynamic Field "Contact with Data"

This feature allows to add contacts with data to tickets.

3.1. Description

3.1.1. Definition of Data Sources

The data sources for this feature reside on the Dynamic Fields of the new 'Contact with data' type, this mean that each Dynamic Field of this type is a new data source. The name of the dynamic field will become the name of the data source, as they are both the same.

For each data source (Dynamic Field) a list of contact attributes can be defined (each attribute can contain only one text based value). The contact attributes can be set as mandatory and searchable if needed. The sort order of the attributes can be also defined.

Contact attributes for each data source could contain any information about the contact as needed, such as different addresses, telephone, birthday, anniversaries, favorite food, hobbies, etc.

Note

The attributes 'Name' and 'ValidID' are always mandatory and they are not automatically added, so for each new data source these attributes must be added manually.

Within the data source definition (or Dynamic Field configuration) they must be represented by the keys 'Name' and 'ValidID' respectively while the values could be 'Name' and 'Validity' for example.

3.1.2. Contact Management

After having at least one data source (Contact with data Dynamic Field) defined, contacts information can be added to the source to populate it.

Apart from the 'Name' and the 'ValidID', each data source could contain different contact information as defined by the data source (e.g. a data source could have an E-mail field while another could contain Telephone and/or Mobile fields).

The management (adding or updating) contact for the data sources is done by an special screen that can be called form the Ticket menu (Edit contacts with data) in the main navigation bar.

3.1.3. Adding Contacts to Tickets

For each configured contact with data dynamic field, a contact created specifically for this dynamic field (or data source) can be chosen from any ticket create or ticket action screen where the dynamic filed has been previously configured.

The contact attributes will be shown in the ticket zoom screen.

3.1.4. Usage of Contacts in Search and Statistics

Tickets can be found in search and statistics via the required attribute 'Name'.

The 'Name' can also be returned as a field value.

3.2. Configuration

SysConfig

AdminContactWithData::RunInitialWildcardSearch

Group: OTRSBusiness, Subgroup: Frontend::Admin::AdminContactWithData

Defines if a search with placeholder should be executed when initially calling the contact management.

Frontend::Module###AdminContactWithData

Group: OTRSBusiness, Subgroup: Frontend::Agent::ModuleRegistration

Allows to distribute contact and contact detail management permissions via group definition.

3.3. Usage

An exemplary usage of contacts with data is as follows:

1. Create a new dynamic field of type 'Contact with data'.
2. Set the possible contact attributes (possible values). 'Name' and 'ValidID' are required for any Contact with data Dynamic Field.
 - Add 'Name' attribute (Key: Name, Value: 'Name').
 - Add 'ValidID' attribute (Key: ValidID, Value: 'Validity').
 - Add any other attribute such as 'Telephone' attribute (Key: Telephone, Value: 'Phone').
3. Add the list of mandatory attribute keys comma separated ('Name' and 'ValidID' are not needed).
4. Set the attribute key order list comma separated as: Name,Telephone,ValidID.
5. Add the list of searchable attribute keys comma separated ('Name' is not needed).
6. Populate the data source by adding at least one contact in the newly created data source by using 'Tickets' → 'Edit contacts with data' screen from the main navigation bar.
7. Add the new dynamic field to the screen's configuration where it should be shown. For example in New Phone Ticket screen by updating the SysConfig setting: Ticket::Frontend::AgentTicketPhone###DynamicField and do the same for Ticket::Frontend::AgentTicketZoom###DynamicField.
8. Go to New phone ticket screen, and notice that the new field is there. Add all ticket needed information.
9. Select an existing contact using autocomplete and choosing a contact.
- 10 The assigned contact and its attributes will be shown in the ticket zoom screen.
- 11 It is possible to update the attributes of the contact by clicking the 'Edit contact data' button that appears in the right side of the title of the contact data box (if the current user is a member of the groups defined in SysConfig setting Frontend::Module###AdminDynamicFieldContactWithData).
- 12 If is necessary to change the contact for this ticket, it can be done via any other ticket action where the dynamic field is configured for display.

4. The Dynamic Field "Database"

This feature implements a dynamic field of the type "Database".

4.1. Description

This feature implements a generic dynamic field type, which offers the possibility to gather data from external databases. Such connected datasets can be searched and filtered using additional masks.

Related found and marked datasets can be saved to the particular tickets through the dynamic field.

'Database' dynamic fields can be created the same way, as the default dynamic fields are created.

4.2. Configuration

The following list of configuration options can be used for this feature.

4.2.1. Adding a 'Database' Dynamic Field

This feature implements a configuration interface to create dynamic fields of the type 'Database'.

'Database' dynamic fields can be created the same way, as the default dynamic fields are created. For this switch to the Admin → Ticket Settings → Dynamic Fields view. In this mask you can select the 'Database' field from the ticket drop down box on the left side. Currently it's not possible to use the 'Database' dynamic field in the article context.

- Configuration "General - Name":

Dynamic fields of the type 'Database' need a unique name just like other dynamic fields, too. This name has to contain only alphanumeric values. This name will be used for internal handling of the field but will not be displayed.

- Configuration "General - Label":

The label can be individually set and can contain white spaces etc. It will be used as the field label in the different views.

- Configuration "General - Field order":

The field order allows a administrator to change the order of created dynamic fields. If this configuration get changed the general field order will be adjusted and other dynamic fields will be moved one position back.

- Configuration "General - Valid":

To use the dynamic field in the configured OTRS 'views' it has to be set as valid. If the field is set to 'invalid' it will disappear from all the configured views but no data will be lost.

4.2.2. Configuration of the External Data Source

Before an external database can be searched and the results be saved at the ticket through the dynamic field, the credentials have to be stored in the configuration of the dynamic field.

Figure 3.27. DynamicField Database Admin screen

Dynamic Fields - Ticket: Change Database Field

Actions

General

• Name: Validity:
Must be unique and only accept alphabetic and numeric characters.

• Label: Field type:
This is the name to be shown on the screens where the field is active.

• Field order: Object type:
This is the order in which this field will be shown on the screens where is active.

Database Field Settings

Possible values:

- Searchfield: Listfield:
- Searchfield: Listfield:
- Searchfield: Listfield:
- Searchfield: Listfield:

Add value:

Show link:
Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.
 Example: [http://some.example.com/handle?query=\\$LQData\['Field1'\]](http://some.example.com/handle?query=$LQData['Field1'])

• Type:

• Server:

Port:

• Database:

• Table / View:

• User:

• Password:

• Identifier:

Multiselect:

CacheTTL:

Searchprefix:

Searchsuffix:

Result Limit:

Case Sensitive:

or

Type: The type of the desired database can be selected here. The field supports the default OTRS database types: MySQL, Oracle, PostgreSQL or MSSQL.

- SID: This option is only available for Oracle connections and will be shown or hidden automatically. Within this option you have to enter the SID of your Oracle connection.
- Driver: This option is only available for ODBC connections and will be shown or hidden automatically. Within this option you have to enter in the hosts system previously configured ODBC driver to connect to the desired MSSQL database.
- Server: The database host (hostname or IP-Address).
- Port: The port of the database server.
- Database: Defines the desired target database of the DBMS. This database will be used for queries.
- Table / View: This table or view will be used for the queries.
- User: The username for the database connection.
- Password: The user password for the database connection.
- Identifier: This select box will be automatically filled through "Possible Values (description below)". This field represents the value which will be stored in the dynamic field.
- Multiselect: If this field is selected, it will be possible to store more than one value to the dynamic field. Those values will be stored comma separated.
- CacheTTL: This value defines the period of validity of the database cache in seconds. Equal queries to the database will be answered through the cache (local filesystem) within this period instead of asking the database again.

- **Searchprefix:** This value will be put in the front of every search term while using the autocompletion to search the database. Wildcard characters are supported as well. The searchprefix will be ignored during the detailed search, but it is still possible to use wildcard characters in those masks.
- **Searchsuffix:** This value will be put in the end of every search term while using the autocompletion to search the database. Wildcard characters are supported as well. The searchsuffix will be ignored during the detailed search, but it is still possible to use wildcard characters in those masks.
- **Result-Limit:** The entered integer value defines the maximum amount of allowed results during a database search. This includes the autocompletion search as well as the detailed search.
- **Case Sensitive:** If this field is selected, case-sensitivity will take effect on searches.
- **Possible values:** As already explained the possible values will fill up the identifier field automatically, which defines the value that will be stored in the dynamic field. Possible values can be created as much as needed (or at least as many table columns as the database table has). The possible values defines the database columns to search in. It is possible to set the column name, a description (label) the field should have, the needed data type and if the field should be a search- or listfield.
- **Name:** The exact name of the database column which will be requested through the database queries.
- **Description:** The label of the field which will be displayed in the detailed search.
- **Datatype:** The data type which will be stored in the dynamic field. Possible values: TEXT, INTEGER or DATE.
- **Filter:** With the filter field, it is possible to choose a ticket attribute or a dynamic field as a filter for the related column. If the dynamic field is bound to a related ticket, the attributes will be used for the filter mechanism, otherwise the filters will be ignored. If filter will be configured to a table column, only search results matching to the search term and the related ticket attribute on exactly the configured column will be displayed.
- **Searchfield:** Indicates if a field should be included in the search requests.
- **Listfield:** Indicates if a field should be displayed in the results.

4.2.3. Screen Configuration

Dynamic fields of type 'Database' have to be activated for the several masks in which they should be displayed like the other types of dynamic fields.

This can be done through Admin → System Administration → SysConfig, in which "Ticket" must be selected on the left hand side.

For every interface area (Frontend), in which the dynamic field of type 'Database' should be displayed, the admin has to configure it to fit his needs. Examples:

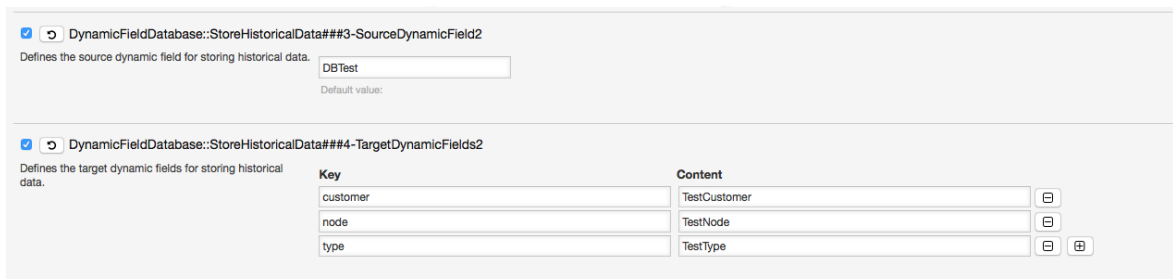
- Frontend::Agent::Ticket::ViewZoom for the ticket zoom view.
- Frontend::Agent::Ticket::ViewPhoneNew for new phone tickets.
- Frontend::Agent::Ticket::ViewEmailNew for new email tickets.
- In each of these view configurations is an entry called "Ticket::Frontend::AgentTicket*###DynamicField". This configuration defines which

dynamic field(s) should get displayed in this view. To add a dynamic field, the internal name of the field has to be filled in the 'Key' field. The field 'Value' can take the values 0 (deactivated), 1 (active) and 2 (active and mandatory).

4.2.4. Storage of Historical Data

This feature offers a functionality to store historical data. For this to work it's necessary to activate and set SysConfig options, as visibly in the following screenshot:

Figure 3.28. DynamicField Database - Historical data settings



The screenshot shows two configuration sections:

- DynamicFieldDatabase::StoreHistoricalData###3-SourceDynamicField2**: A checkbox is checked. Below it, a text input field contains "DBTest".
- DynamicFieldDatabase::StoreHistoricalData###4-TargetDynamicFields2**: A checkbox is checked. Below it, a table with two columns, "Key" and "Content", is visible.

Key	Content
customer	TestCustomer
node	TestNode
type	TestType

In the configuration option for the "SourceDynamicField" it's needed to fill in the already created dynamic (Database) field name, which will be used to gather the historical data. In the related option "TargetDynamicField" the field(s) "Key" have to be filled with the table columns of the connected external database, which will be readout. For every column the related target dynamic field has to be configured in the field "content". The gathered data will be saved in these dynamic fields.

If the configuration is ready and active, the configured fields will be readout from the external database, since the source field gets a new value via the configured masks. The data will be searched by it's stored identifier via an event module and the found values will be stored in the target dynamic fields.

4.2.5. Sysconfig Settings

AutoComplete::Agent###DynamicFieldDatabaseSearch

Group: Framework, Subgroup: Frontend::Agent

Defines the config options for the autocompletion feature.

Ticket::EventModulePost###950-StoreHistoricalData

Group: Ticket, Subgroup: Core::Ticket

Updates dynamic fields, if configured ones will be updated.

DynamicFieldDatabase::StoreHistoricalData###1-SourceDynamicField1

Group: OTRSBusiness, Subgroup: Core

Defines the source dynamic field for storing historical data.

DynamicFieldDatabase::StoreHistoricalData###2-TargetDynamicFields1

Group: OTRSBusiness, Subgroup: Core

Defines the target dynamic fields for storing historical data.

DynamicFieldDatabase::StoreHistoricalData###3-SourceDynamicField2

Group: OTRSBusiness, Subgroup: Core

Defines the source dynamic field for storing historical data.

DynamicFieldDatabase::StoreHistoricalData###4-TargetDynamicFields2

Group: OTRSBusiness, Subgroup: Core

Defines the target dynamic fields for storing historical data.

4.3. Usage

An exemplary usage of DynamicField Database is as follows:

4.3.1. Searching and Saving Datasets - Autocompletion

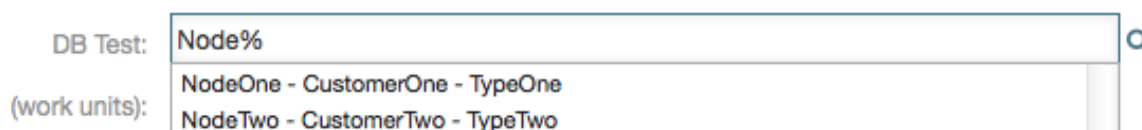
After the created dynamic fields are activated in the well known masks (like ViewPhoneNew, ViewEmailNew) a new text field appears with the name, the dynamic field got in the configuration. In this field it is possible to input searchterms and therefore execute a search over all configured database fields. Otherwise do a click on the link 'Detailed search' and start a detailed search in which the fields to search in are selected explicitly.

Figure 3.29. DynamicField Database - Test field



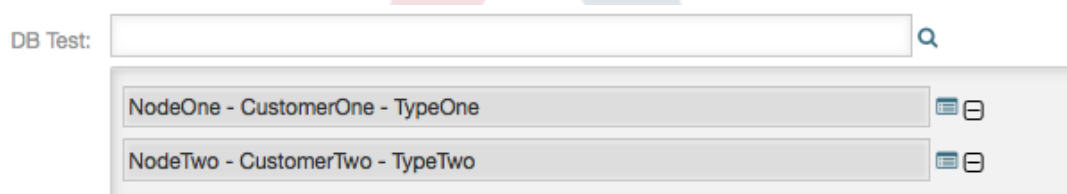
Since search terms are typed in into the text field, a database search will be started over the configured columns and the result will displayed via an autocompletion below the text field. The more exact the search term is, the more exact will be the result (less result entries).

Figure 3.30. DynamicField Database - Autocomplete feature



If the wished value will be displayed in the results, it can be selected via a mouse click or via the keyboard and therefore be added to the dynamic field results.

Figure 3.31. DynamicField Database - Selected items



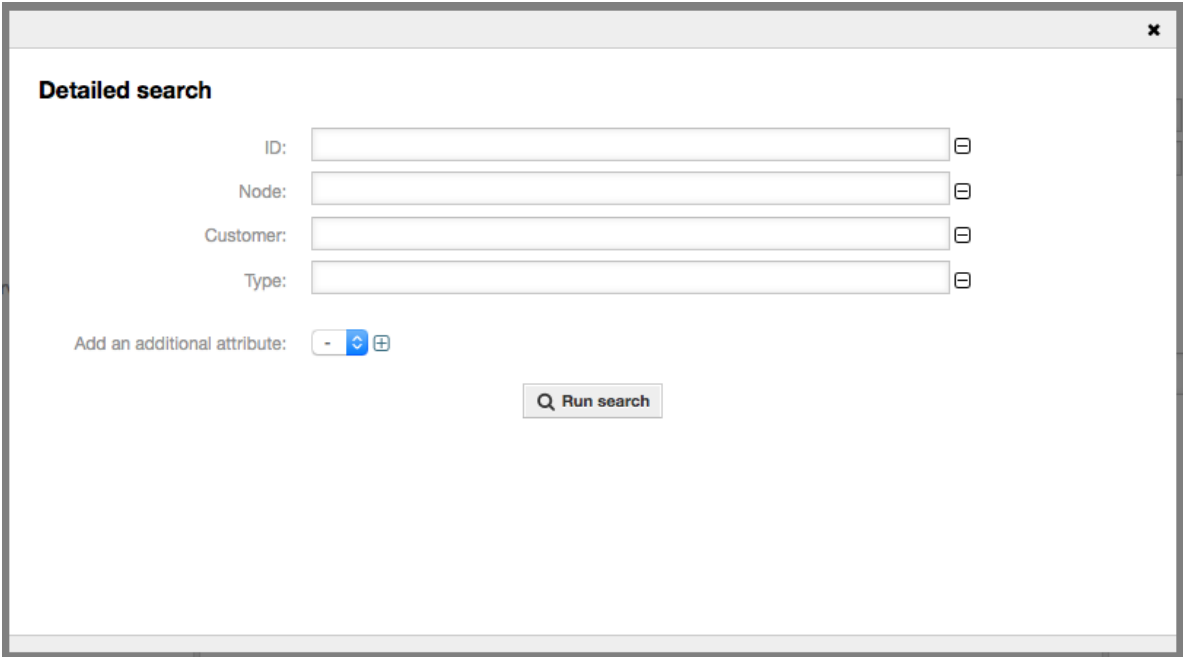
Via the link 'Details' a popup screen can be accessed, which offers detailed information about the whole result row. This information includes the line headers and the data. This information can be used to get an overview about the rest (of the not configured) columns or to compare data.

The added result entries can be removed via the minus button.

4.3.2. Searching and Saving Datasets - Detailed Search

The link 'Detailed search' opens a new modal dialog to start a new database search. In this mask it is possible to select the fields to search on explicitly.

Figure 3.32. DynamicField Database - Detailed search



Detailed search

ID:

Node:

Customer:

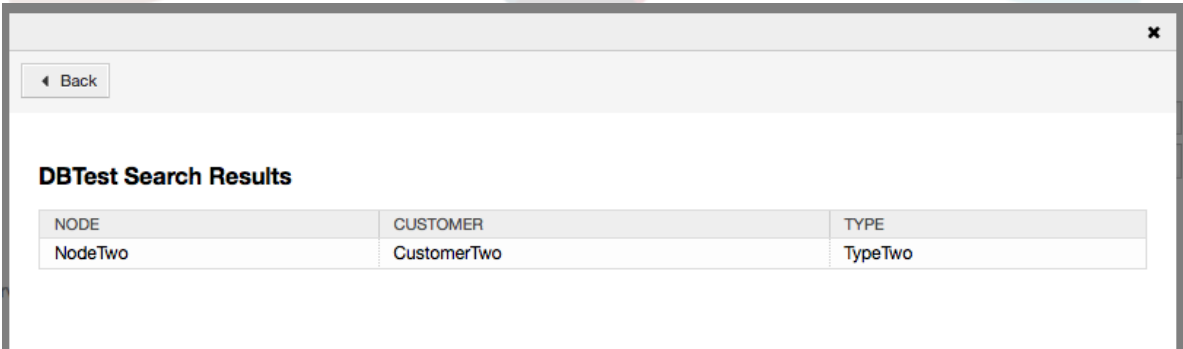
Type:

Add an additional attribute:

By default the first available field is activated, but it's also possible to remove available fields or add additional ones. Only activated and filled fields are considered for the search. Wildcard characters '*' are allowed in every single field.

The database search will be executed via the button "Start search" and the results will be tabular displayed. If the search was successful, the results will be listed and one of the entries can be selected via a mouse click. The value will be added to the list of saved values afterwards.

Figure 3.33. DynamicField Database - Detailed search result



DBTest Search Results

NODE	CUSTOMER	TYPE
NodeTwo	CustomerTwo	TypeTwo

Independent of using the autocompletion or the detailed search, every single result can just selected ones. If an agent tries to select a value multiple times, a related warning message is displayed.

5. Import ready-to-run process

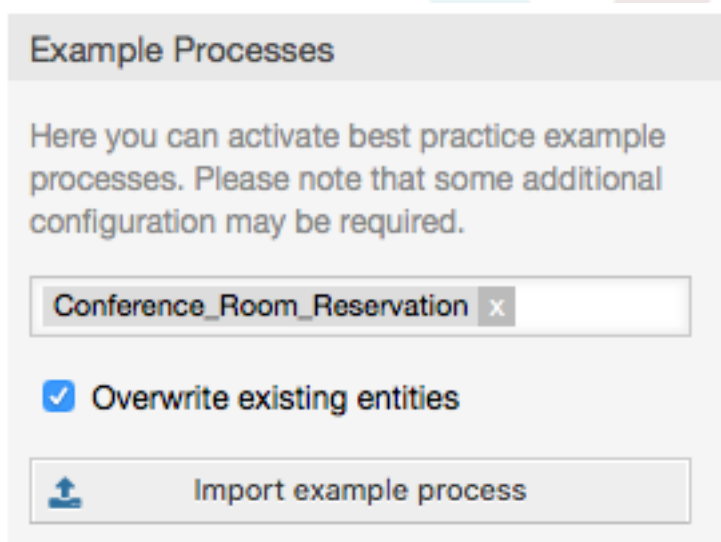
5.1. Import

On the *AdminProcessManagement* screen you can find an *ready-to-run process* widget, where you can find some best practice ready-to-run processes.

The following ready-to-run processes are available in the **OTRS Business Solution™**:

- Conference Room Reservation
- ITIL Incident Management
- Office Materials Procurement
- Order Request Management
- Release And Deployment Management
- Request For Leave Management
- Start RMA
- Travel Expense

Figure 3.34. Import ready-to-run process widget



To install a ready-to-run process, just select the desired process from the drop-down menu in the *Ready-to-run process* widget and click the *Import ready-to-run process* button.

During the import process, OTRS takes care of creating the needed dynamic fields and/or any needed updates to the system configuration.

6. Import ready-to-run Web Services

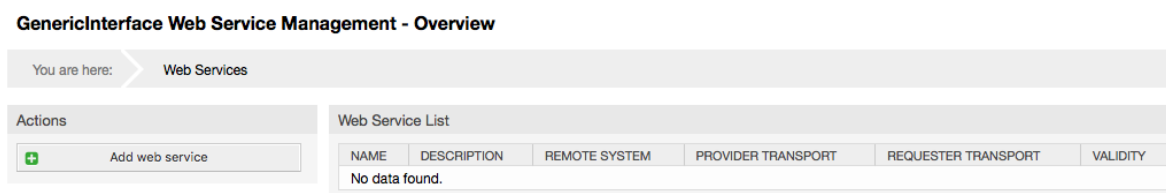
6.1. Import

There are three ready-to-run Web Services available in the **OTRS Business Solution™**:

- BugzillaConnector
- JIRACONNECTOR
- OTRSCONNECTOR

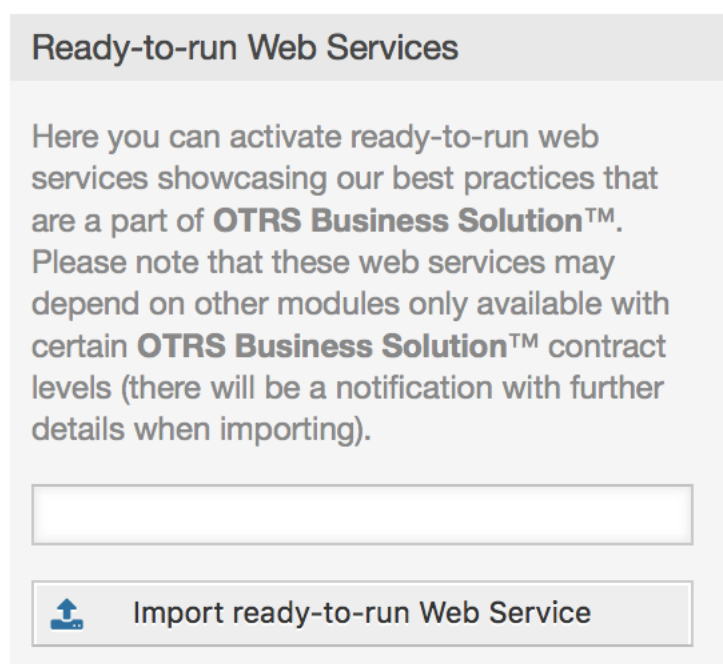
To install one of these web services, go to the *GenericInterface Web Service Management* page and click on the *Add web service* button.

Figure 3.35. Add web service



Locate the *Ready-to-run Web Services* widget, select one of the provided web services from the drop-down menu, and click the *Import ready-to-run Web Service* button.

Figure 3.36. Import ready-to-run Web Service



During the import process, OTRS takes care of creating the needed dynamic fields and/or any needed updates to the system configuration.

Note: The ready-to-run Web Services may require additional feature add-ons to be installed (**OTRSGenericInterfaceInvokerTicket** and **OTRSGenericInterfaceInvokerEventFilter**).

7. SMS Notifications and Notification Web View

7.1. Description

The **OTRS Business Solution™** comes with two new notification features: SMS notifications and the notification web view. Both of them are technically notification methods besides the existing email method and can be activated for each notification (e.g. "Ticket new note notification" or "Ticket create notification") on the AdminNotificationEvent screen.

7.2. Setting up SMS Notifications

In order to use SMS as a way of notification for admins and customers, you have to buy a SMS unit package. Please get in touch with sales@otrs.com on this matter. Once you've bought a package, you will be able to look up your current contingent of remaining SMS units on the admin screen for the SMS cloud service (AdminCloudServiceSMS).

Figure 3.37. Admin Cloud Service SMS Screen

Cloud Service Management » SMS (Short Message Service)

Actions	Configuration
<p>Go to overview</p> <hr/> <p>Cloud service status</p> <p>Cloud service availability: OK</p> <p>Remaining SMS units: 50</p>	<p>Name: SMS</p> <p>* Phone field for agent: <input type="text" value="UserMobile"/> <small>Agent data field from which the mobile phone number for sending the SMS should be taken.</small></p> <p>* Phone field for customer: <input type="text" value="UserMobile"/> <small>Customer data field from which the mobile phone number for sending the SMS should be taken.</small></p> <p>* Sender string: <input type="text"/> <small>Will be shown as sender name of the SMS (Not longer than 11 characters).</small></p> <p>Allowed role members: <input type="text"/> <small>If selected, only users assigned to these roles will be able to receive SMS (optional).</small></p> <p>Comment: <input type="text"/></p> <p>Validity: <input type="text" value="valid"/></p> <p><input type="checkbox"/> In order to be able to use the SMS transmission feature of the OTRS AG, I hereby declare that I have read and understood the Data Protection Information.</p> <p><input type="button" value="Save"/> or <input type="button" value="Cancel"/></p>

On this screen, you can also set up some more parameters of the SMS feature, e.g. the sender string which should be used for the SMS text messages or the agent/customer preference field which should be used to take the mobile phone number from.

To make SMS available for notifications, you have to enable it for the notifications of your choice in AdminNotificationEvent. Besides the existing "Email" notification method, you can enable SMS notifications by enabling the checkbox as to be seen in the screenshot below.

Note

Please be careful using the "Send by default" checkbox on SMS notifications. Enabling this checkbox will cause this notification to be sent by SMS to all agents with a phone number stored in the configured field. This could cause a high usage of your available SMS units!

On this screen, you can also add more generic phone numbers (e.g. for archiving purposes) which will receive all of the relevant notifications (besides the addressed agents).

Figure 3.38. Enabling SMS Notifications

Notification Methods

These are the possible methods that can be used to send this notification to each of the recipients. Please select at least one method below.

Email

Enable this notification method:

Send by default:

Should the notification be sent to agents who have not yet made a choice in their preferences?

Additional recipient email addresses:

Notification article type:

An article will be created if the notification is sent to the customer or an additional email address.

Email template:

Use this template to generate the complete email (only for HTML emails).

Web View

Enable this notification method:

Send by default:

Should the notification be sent to agents who have not yet made a choice in their preferences?

SMS (Short Message Service)

Enable this notification method:

Send by default:

Should the notification be sent to agents who have not yet made a choice in their preferences?




Recipient SMS numbers:

If you configured a notification to be visible in the agent preferences, agents will now be able to enable/disable SMS notifications manually on their own for this notification.

Figure 3.39. Agent Preferences SMS Notification Settings

Ticket notifications

Choose for which kind of ticket changes you want to receive notifications.

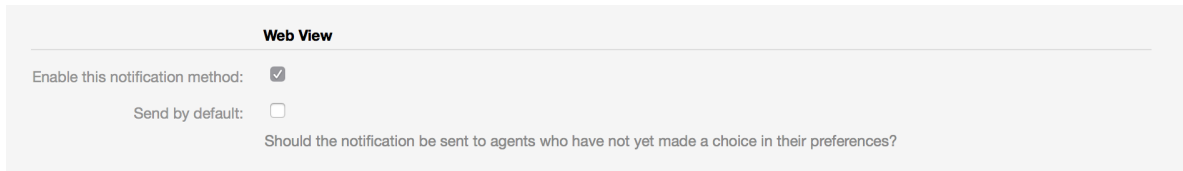
NOTIFICATION			
Ticket create notification	<input type="checkbox"/>		
Ticket follow-up notification (locked)	<input type="checkbox"/>		
Ticket follow-up notification (unlocked)	<input type="checkbox"/>		
Ticket lock timeout notification	<input type="checkbox"/>		
Ticket new note notification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket queue update notification	<input type="checkbox"/>		
Ticket service update notification	<input type="checkbox"/>		

Please note that you can't completely disable notifications marked as mandatory.

7.3. Setting up and Using the Notification Web View

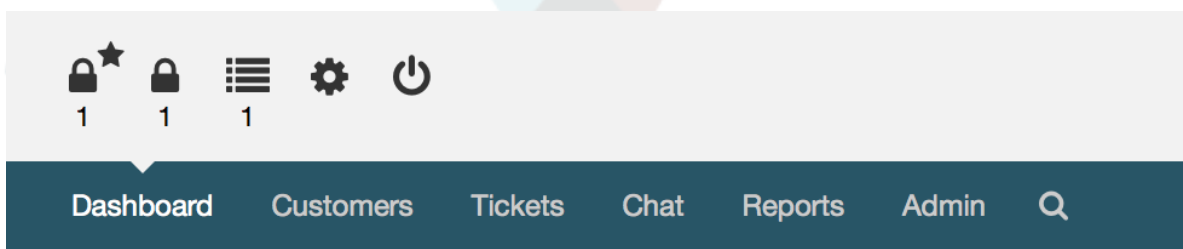
Setting up the notification web view for agents is similar to the setup for SMS notifications as described above.

Figure 3.40. Enabling the Notification Web View



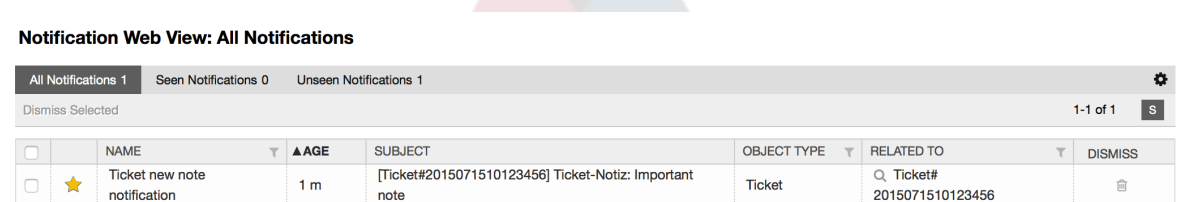
Once you've enabled the notification web view for a certain notification, agents will see a new icon on top of their screen in OTRS (within the toolbar) each time a new notification arrives.

Figure 3.41. Notification Web View Icon on the Toolbar



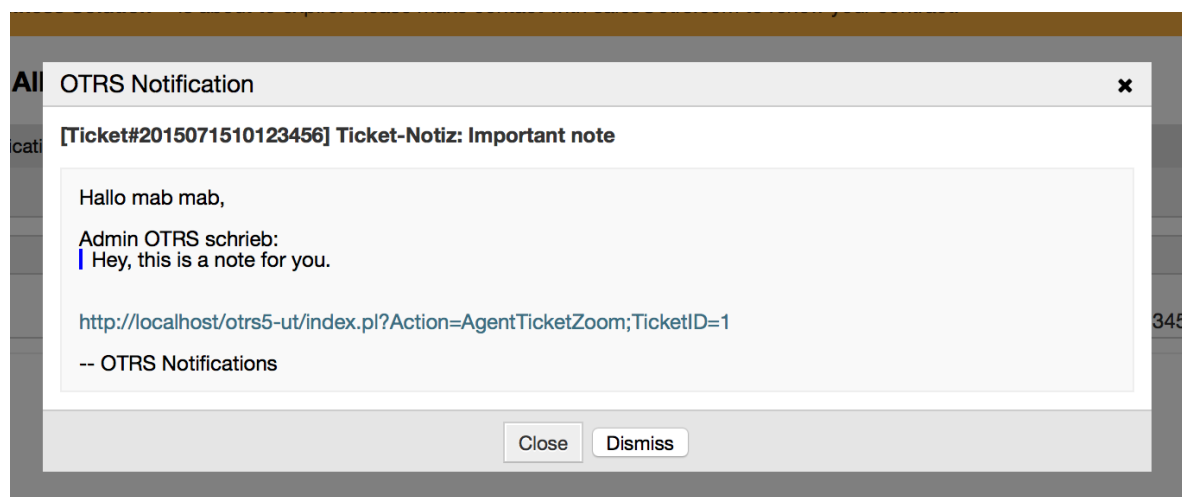
Clicking this icon, agents will get an overview of all of their notifications and can read and dismiss them from here.

Figure 3.42. Notification Web View Overview



Powered by OTRS 5

Figure 3.43. Notification Web View Detail



8. The Report Generator

8.1. Description

The report generator allows to combine multiple statistics for sending/downloading. Reports can be configured to be sent automatically on specified times or run manually.

8.2. Configuration

No further configuration needed.

8.3. Usage

8.3.1. Creating Reports

After you've entered title and description for your report in the first step, you'll be able to set up your report.

8.3.1.1. General Settings

Set up title, description and validity of the report. This information will not be visible in the report.

Figure 3.44. Automatic generation settings

General settings

* Name:

* Description:

* Valid:

8.3.1.2. Automatic Generation Settings

If the report should be generated automatically (e.g. once per day), you can set up subject, text and recipients for the email which is going to be sent and which will contain the report as an attachment. You'll also need to add information on how often the report should be sent. The data format is taken from the cron mechanism of unix-based operating systems. For more information on which settings are possible, please refer to official cron documentation sources or [wikipedia](https://en.wikipedia.org/wiki/Cron).

Figure 3.45. Automatic generation settings

Automatic generation settings

Automatic generation times (cron):

Specify when the report should be automatically generated in cron format, e. g. "10 1 * * *" for every day at 1:10 am.

Automatic generation language:

The language to be used when the report is automatically generated.

Email subject:

Specify recipient email addresses (comma separated).

Email body:

Specify the text for the automatically generated email.

Email recipients:

Specify recipient email addresses (comma separated).

8.3.1.3. Output Settings

In this section, you can set up additional information which should be contained in the report (e.g. a preamble or epilogue). This could e.g. be used for adding copyright or data protection information.

Figure 3.46. Output settings

Output settings

Headline:

Title:

Caption for preamble:

Preamble:

Caption for epilogue:

Epilogue:

8.3.2. Manually Generating Reports

To generate a report, you can use the "Run now" button from the reports overview. You'll be asked for confirmation and afterwards the report will be created and sent immediately. Please find screenshots of a generated report below.

Figure 3.47. Report: Front page



Figure 3.48. Report: Table of contents

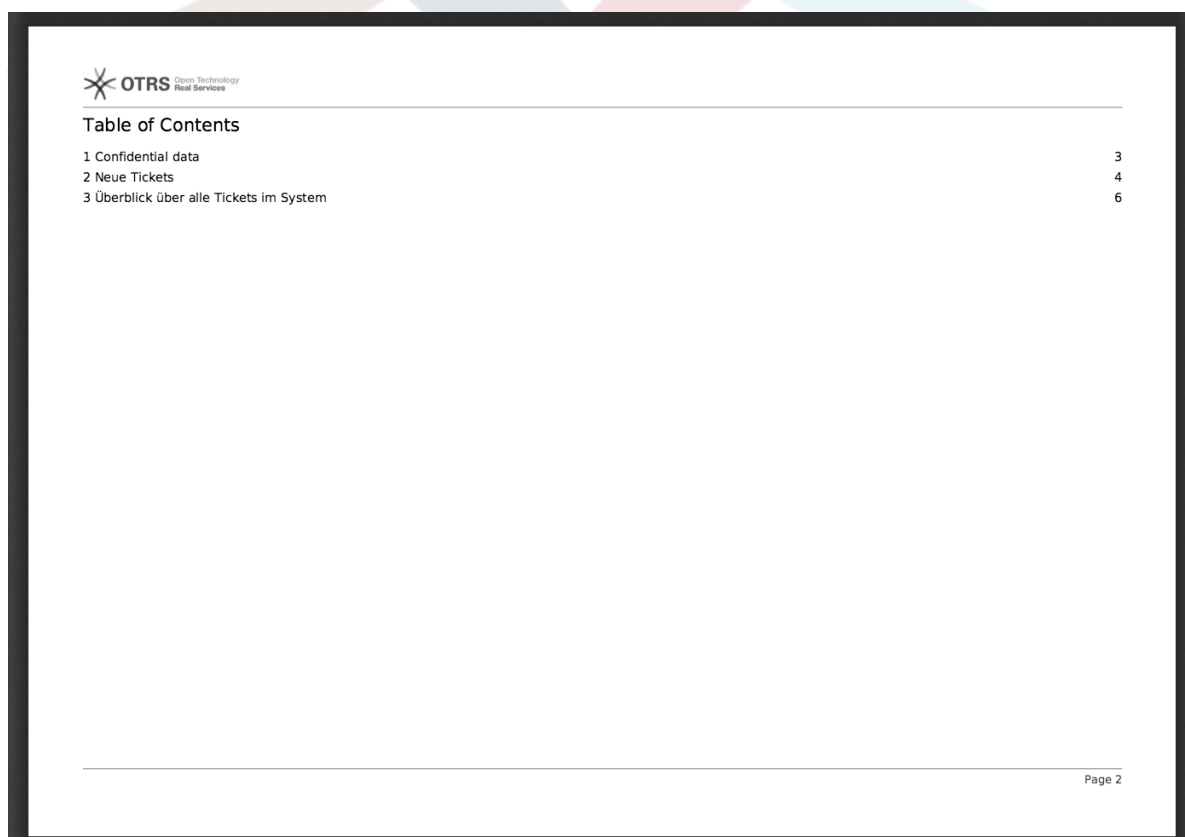


Figure 3.49. Report: Preamble

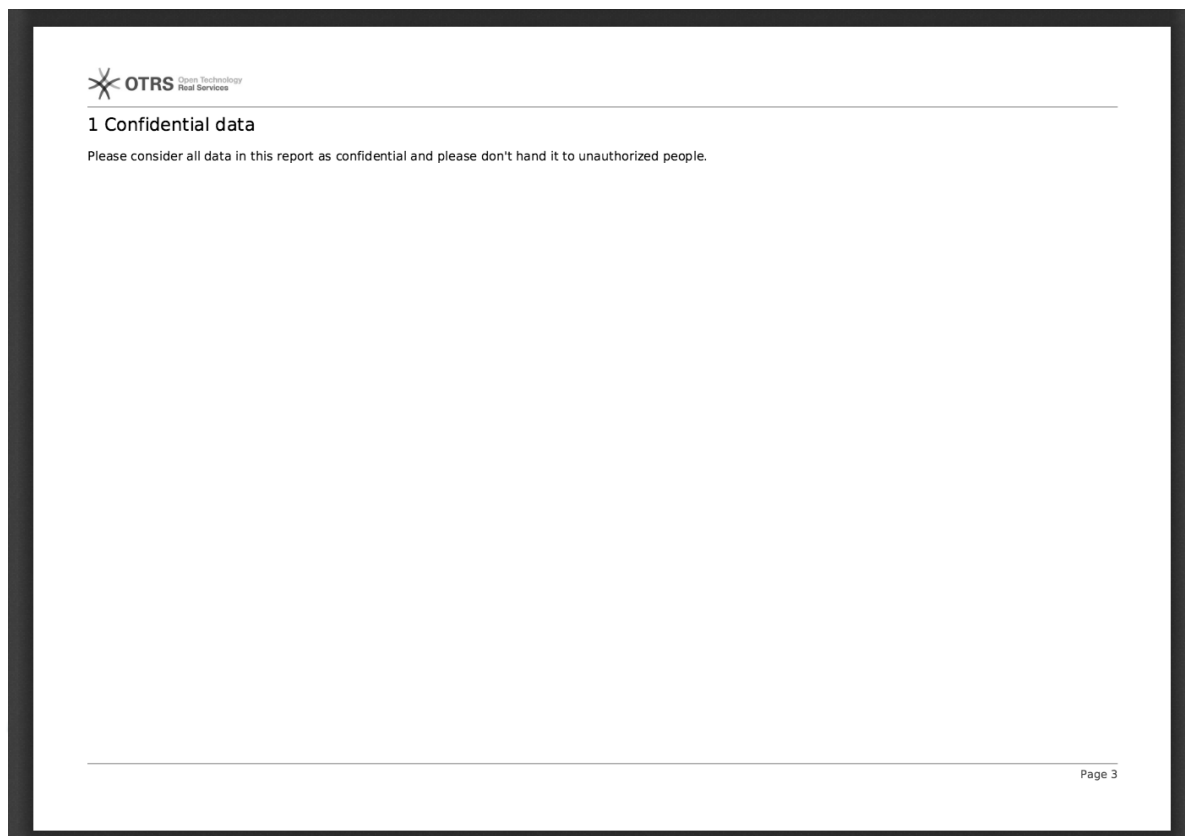
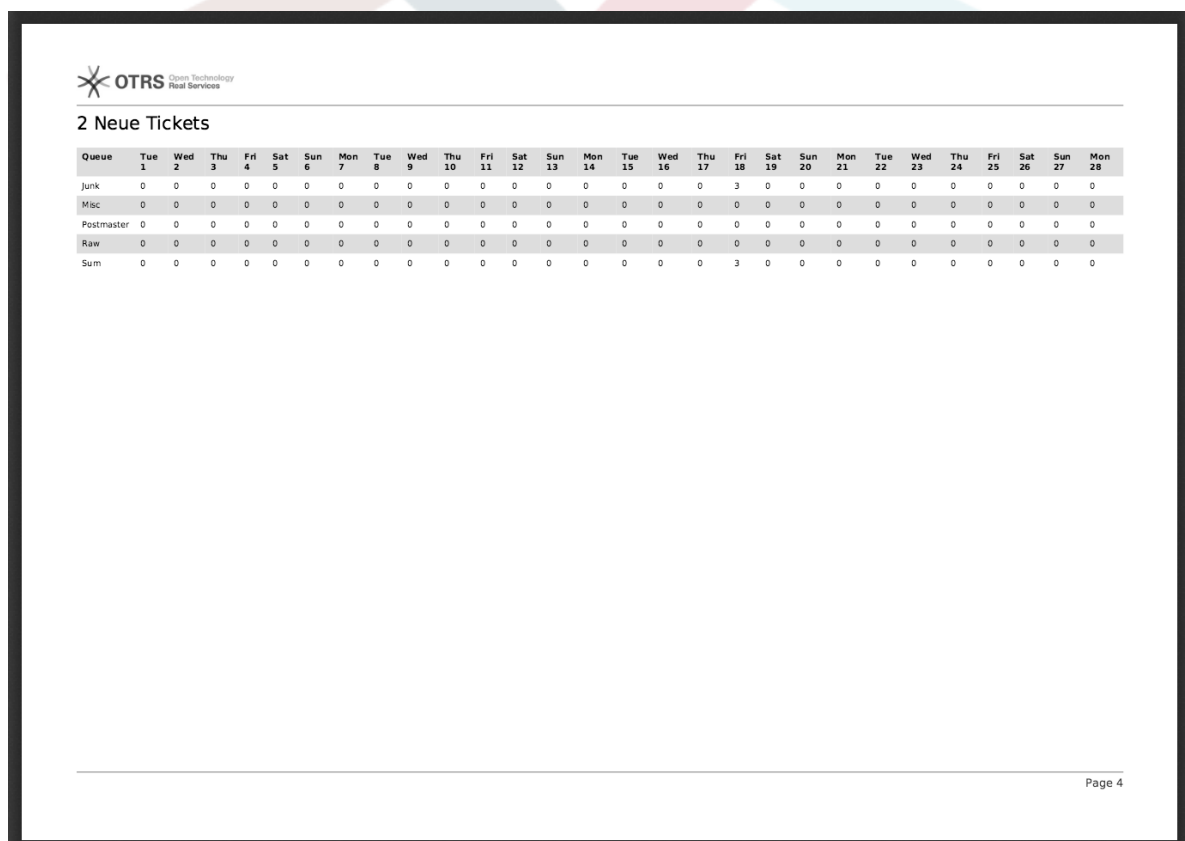


Figure 3.50. Report: Statistics



9. The SLA Field Selection Dialog

9.1. Description

The field selection dialog enables you to configure popup messages customers should see when they select specific SLAs on ticket creation on the customer frontend. These popup messages could contain information about the SLA the customer is about to select and to give them the possibility to re-think their decision.

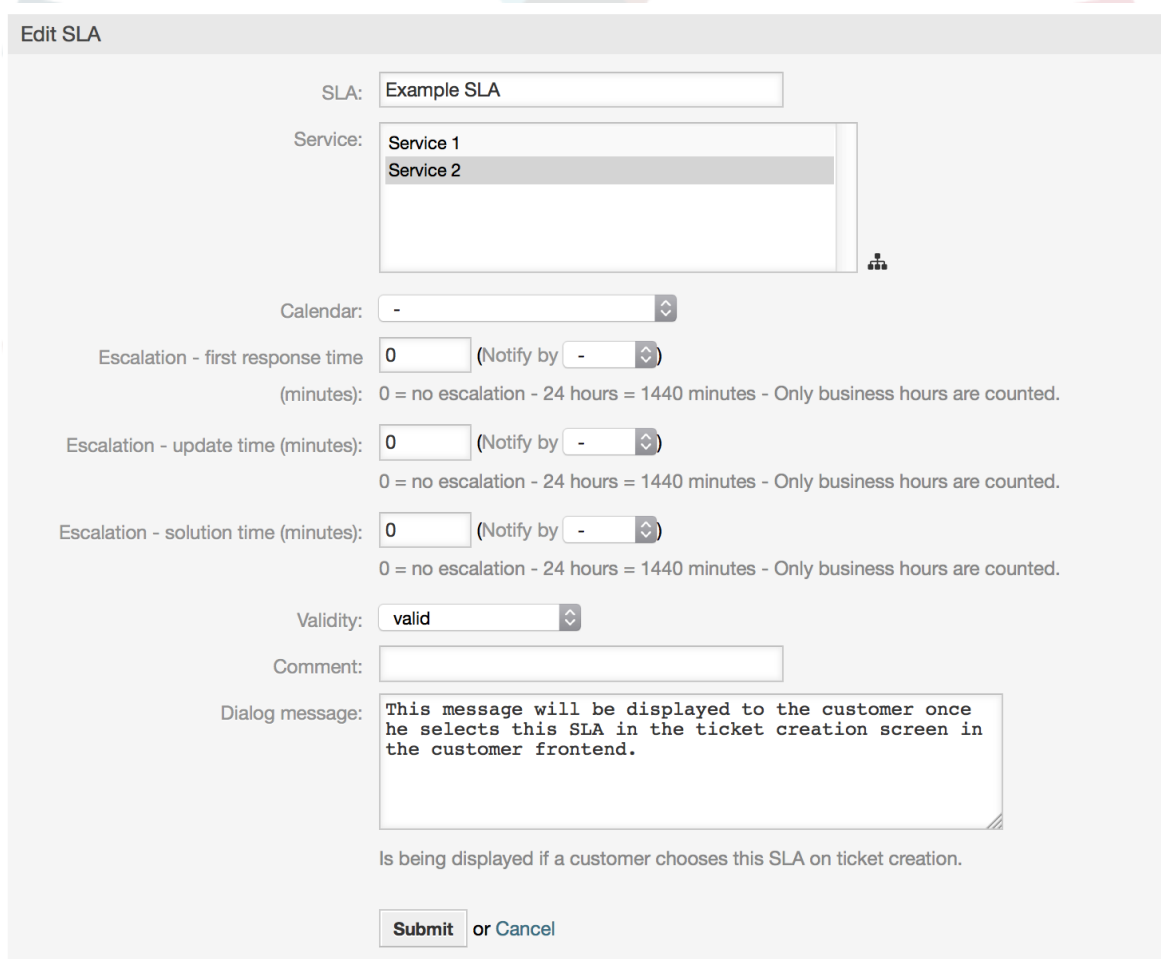
9.2. Configuration

No further configuration needed.

9.3. Usage

9.3.1. Configuring the SLA message

Figure 3.51. SLA configuration



Edit SLA

SLA:

Service:

Calendar:

Escalation - first response time: (Notify by
(minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - update time (minutes): (Notify by
0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - solution time (minutes): (Notify by
0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Validity:

Comment:

Dialog message:

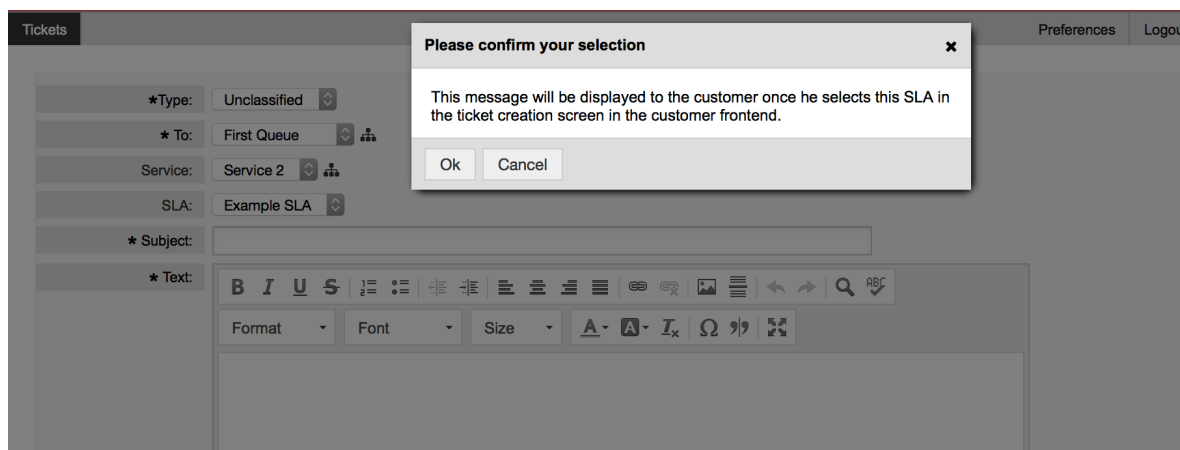
Is being displayed if a customer chooses this SLA on ticket creation.

or

You can configure the message on each SLA by using the SLA administration screen.

9.3.2. How the message looks in the customer frontend

Figure 3.52. SLA message



This is what the customer will see once he selects the SLA this message is configured for. He can either confirm or deny his selection, the latter one will reset the SLA selection afterwards.

10. The Article Attachment Overview

10.1. Description

The article attachment overview enables you to view a list of all attachments of a ticket. Attachments will be listed by attributes such as file name, file type, file size, date of addition and which article they belong to. From the overview screen, you can download certain attachments or create an archive file which contains multiple or all attachments of the ticket you're viewing.

10.2. Configuration

No further configuration needed.

10.3. Usage

Figure 3.53. Switching to the article attachment overview

nk | Owner | Responsible | Attachments | Customer | Note | Pl

Once a ticket has at least one attachment, the "Attachments" menu item will be displayed in AgentTicketZoom. Clicking it will open a popup which contains a list of all attachments.

Figure 3.54. Using the article attachment overview

Attachments of Ticket#: 2014121854000013 - Test zum Splitten
 Close window

Attachment Overview

Filter Attachments...

<input type="checkbox"/>	TYPE	FILENAME	SIZE	▼ DATE	<input type="checkbox"/>	ARTICLE
<input type="checkbox"/>		chat-manager.jpeg	152.2 KBytes	01/15/2015 12:06	<input type="checkbox"/>	#4 - Note
<input type="checkbox"/>		cover1.jpg	81.9 KBytes	01/15/2015 12:06	<input type="checkbox"/>	#4 - Note
<input type="checkbox"/>		vector_dancers_by_blindblues46.pdf	512.4 KBytes	01/15/2015 12:06	<input type="checkbox"/>	#4 - Note

Close

11. The Ticket Timeline View

11.1. Description

The ticket timeline view provides a chronological view of all actions which happened on a ticket (which includes articles, owner changes, incoming mails, etc.). With the ticket timeline view, agents are able to get a good overview of a ticket in less time.

11.2. Configuration

SysConfig

ChronicalViewEnabled

Group: OTRSBusiness, Subgroup: Frontend::Agent

Controls whether or not the ticket timeline view is enabled.

11.3. Usage

Figure 3.55. Switching to the Ticket Timeline View



To access the ticket timeline view, use the clock icon on the top right corner of the article widget in AgentTicketZoom. You will be redirected to the timeline view and this view will be kept as preference until you change back to another view.

In the ticket timeline view, you can work on the ticket as you're used to. You can inspect the time of each event in the timeline by hovering the little square next to each event with your mouse cursor. You can view the full content of articles by using the zoom icon on top of the certain articles box, where you will find all common article actions such as reply, split, forward, etc.

Figure 3.56. Using the Ticket Timeline View

Ticket Timeline View

Outgoing Email

Subject: [Ticket#201412185400013]
From: OTRS System
To: mab_kunde2 mab_kunde2 mab_kunde2@localhost

Hello Mr. Customer,
 Thanks for your request. We're going to work on this!

 Super Support - Waterford Business Park
 5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA
 Email: hot@example.com - Web: [1]http://www.example.com/

Pending Time Set
 Updated: 2015-01-16 11:59

State Updated
 Old: "open" New: "pending reminder"

Note Added

Subject: Internal Note
From: "mab mab"

Changed SLA and Service. Please deal with this request.

Dynamic Field Updated
 Updated: fieldName=Multiselect;Value=Key1, Key2;OldValue=;

SLA Updated
 Updated SLA to SLA 1.

Service Updated
 Updated Service to Service 2.

Ticket Locked
 Locked ticket.

New Responsible
 New responsible is "mab".

New Owner
 New owner is "mab".

Incoming Web Request

Subject: Test zum Splitten
From: "mab_kunde2 mab_kunde2"
To: Junk

Customer Updated
 Updated: CustomerID=mab_kunde2;CustomerUser=mab_kunde2;

SLA Updated
 Updated SLA to SLA 2.

Service Updated
 Updated Service to Service 1.

Ticket Created
12/18/2014 14:28:09

Appendix A. Additional Resources

otrs.com

The OTRS website with source code, documentation and news is available at www.otrs.com. Here you can also find information about professional services and OTRS Administrator training seminars from OTRS Group, the creator of OTRS.

Translations

You can help translate OTRS to your language at Transifex.

